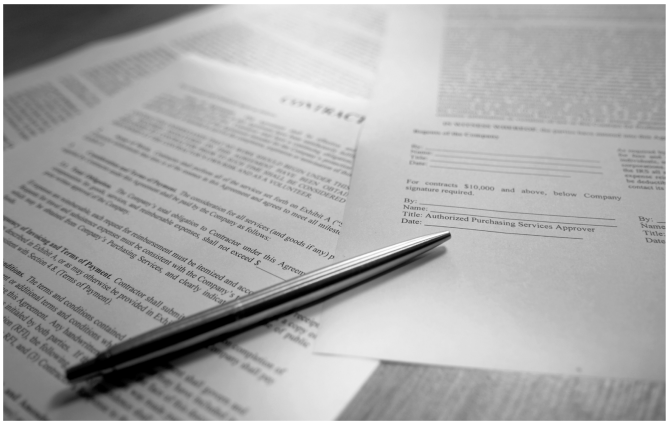

ProcServe

MIS User Manual Release 4.6

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Software Version: 4.6.0

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1

About this Guide

1 About this Guide

1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the MIS system effectively.

Who is ProcServe?

ProcServe is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. ProcServe particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does ProcServe offer?

- ProcServe offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The ProcServe solutions are a blend of world-class application Commerce Modules, all hosted and managed by ProcServe, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The ProcServe Commerce Network

ProcServe offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, ProcServe implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. ProcServe also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

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2

Management Information System (MIS)

2 Management Information System (MIS)

2.1 Introduction

This documentation relating to the use of the MIS platform is intended for authorised users of the ProcServe Trading Network hosted software solution. It explains the functions available within the Management Information System user interface and how to use them.

This documents contains the information required to access and use the MIS. The document also refers to some of the reports available and the details you may find in them. Included within the document are reports that may not be available to your subscribing organisation.

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2.2 Overview

The ProcServe Management Information System (MIS) solution is based on a consolidated data warehouse which derives data from various sources including third party data sources where necessary. Data imported from these sources is stored in a relational database which provides "fact" tables from which OLAP (Online Analytical Processing) cubes are built. The OLAP cubes are designed to contain a number of "measures" (values and counters) and "dimensions" which enable analysis from different perspectives.

By providing data in OLAP cubes, rather than a flat database structure, interactive, multi-dimensional analysis and reporting is possible. Users can perform trend, comparative and time-based analyses and still obtain traditional static reports when needed. Additionally, users can view data at a summary level and then drill-down through a hierarchy to examine the data at more detailed levels.

The MIS uses internet browser technologies to enable a rich, interactive interface with a combination of custom business intelligence dashboards, dynamic data analysis and access to traditional static reports.

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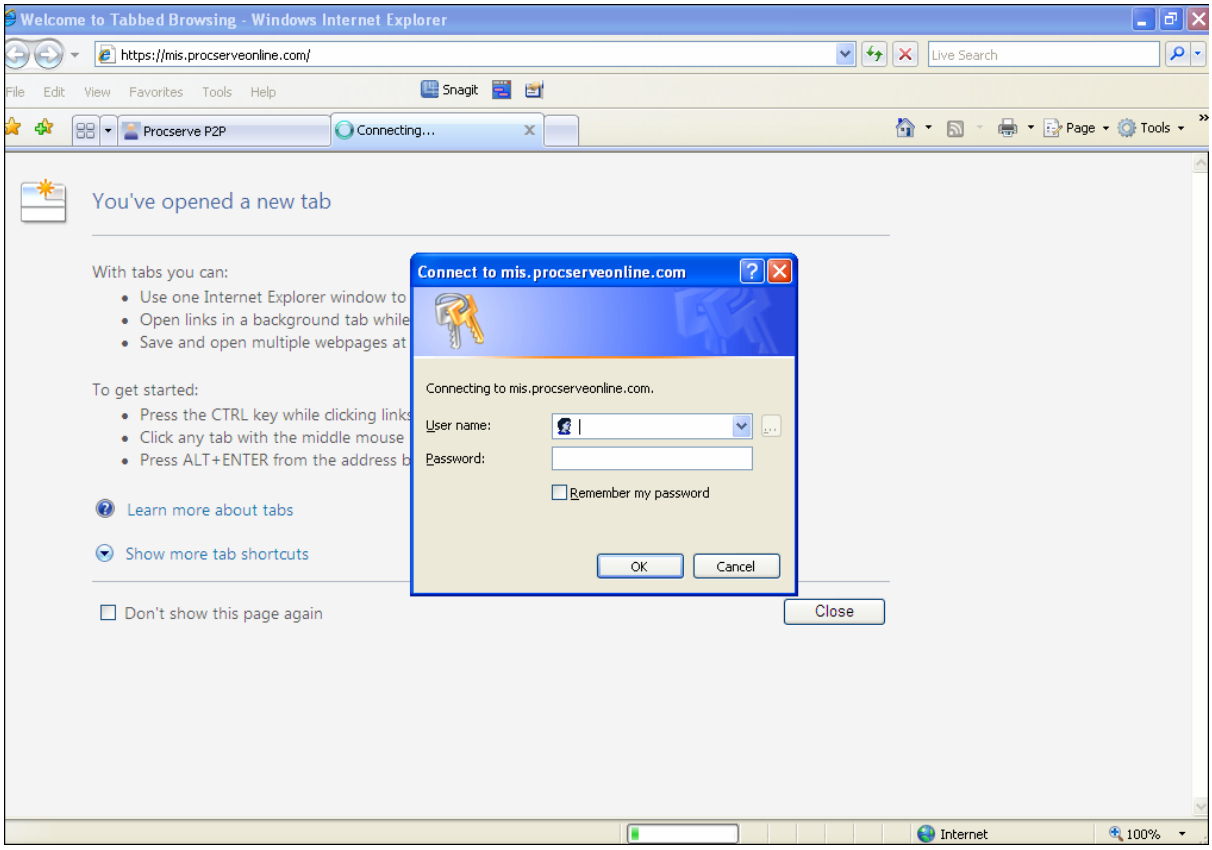
2.3 Gaining Access

To access the MIS system browse to: https://mis.procserveonline.com

Entering Login Details

The browser will prompt you for your login credentials:



Type your user ID and password in the relevant fields in the log in panel and click the "OK" button to continue.

Note: that validation of the Password is case sensitive.

If you have forgotten your password please contact the Helpdesk who can send it to you.

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2.4 The Homepage

2.4.1 Overview

The Home Page displays a number of reports and graphs to provide a summary of key areas within the marketplace. From the Home Page the user can quickly navigate to the other reporting types and easily add their commonly used reports and links to page. Every user can modify their Home Page and add or remove various reporting components as required.

A typical Home Page is shown below:

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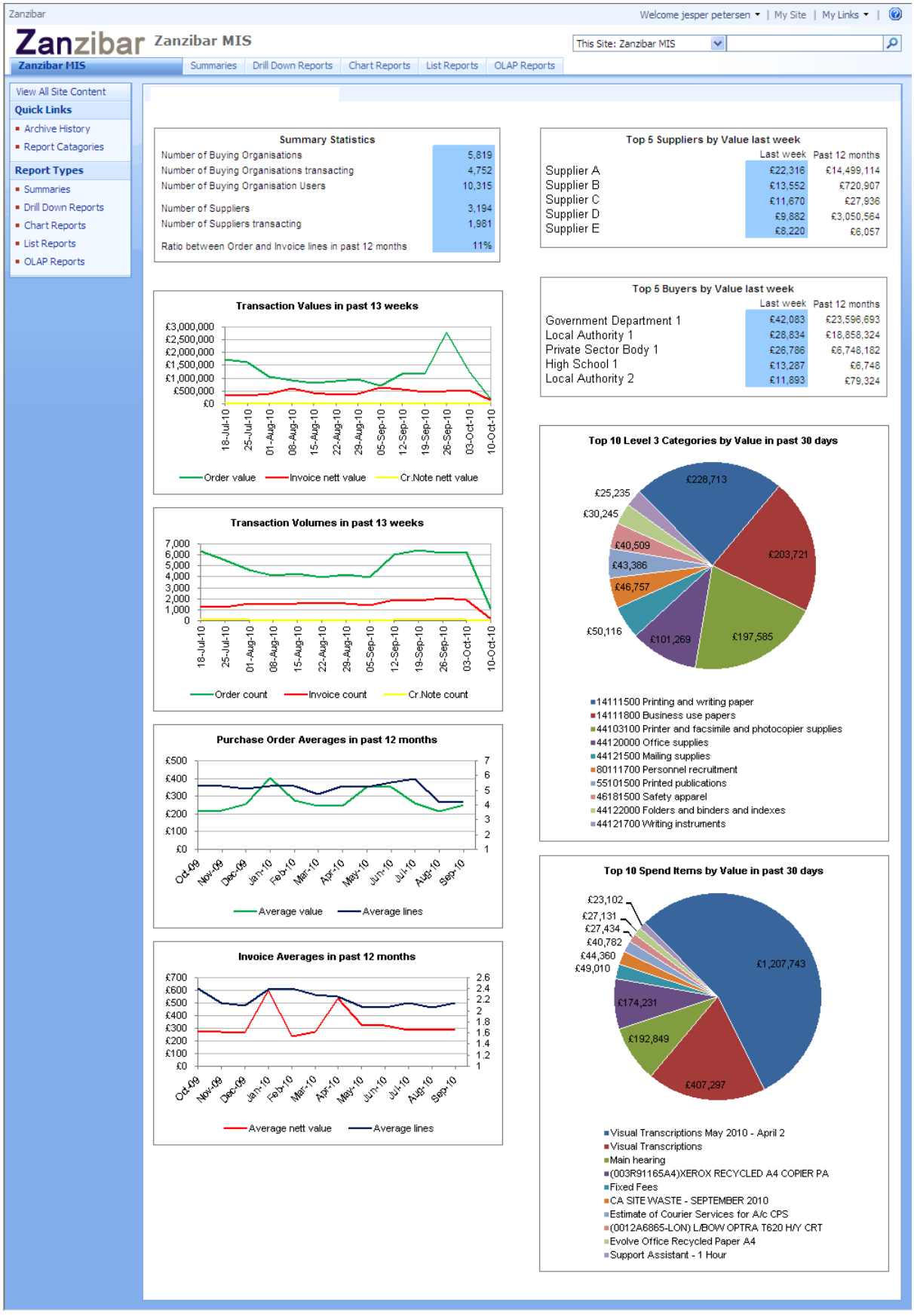

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2.4.2 Navigating Around the Homepage

The Home Page provides direct access to the various reports through the use of "Tabs". Each report is grouped into one of five types:

Summary Reports
Drill Down Reports
Chart Reports
List Reports
OLAP Reports

To view the reports just select the tab and the associated reports will appear in the list.

Each report has a unique name and a short description to aid your selection of the correct report. Further information includes the date the report was last modified and an option to view the report history or assign a category to the report to help filtering.

To view the report history:

Click "View History" for a particular report. The history details will appear as shown below, each time a new version of the report is uploaded by the Service Provider then the previous version will be available in the history.

To change the report "category":

Click on the actual report name, for example "Purchase Orders by SBO (Matrix)", the report name will be highlighted.

The drop down menu will then appear.

Click "Edit Properties" and the report properties will be displayed.

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2.5 MIS Reports

2.5.1 Summaries Report Tab

This report group contains a number of reports that are dynamic and allow you to drill down to the view the individual transactions that form the consolidated values. The following reports are available:

Documents by Buying Organisation & Supplier

Documents by Buying Organisation & UNSPSC Code

Documents by Supplier & Buying Organisation

Documents by Supplier & UNSPCS Code

Documents by UNSPSC Code & Buying Organisation

Documents by UNSPSC Code & Supplier

Top Buying Organisations Column Chart

Top Suppliers Column Chart

Transaction Value Graph

Transaction Volume Graph

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2.5.1.1 Documents by Buying Organisation & Supplier

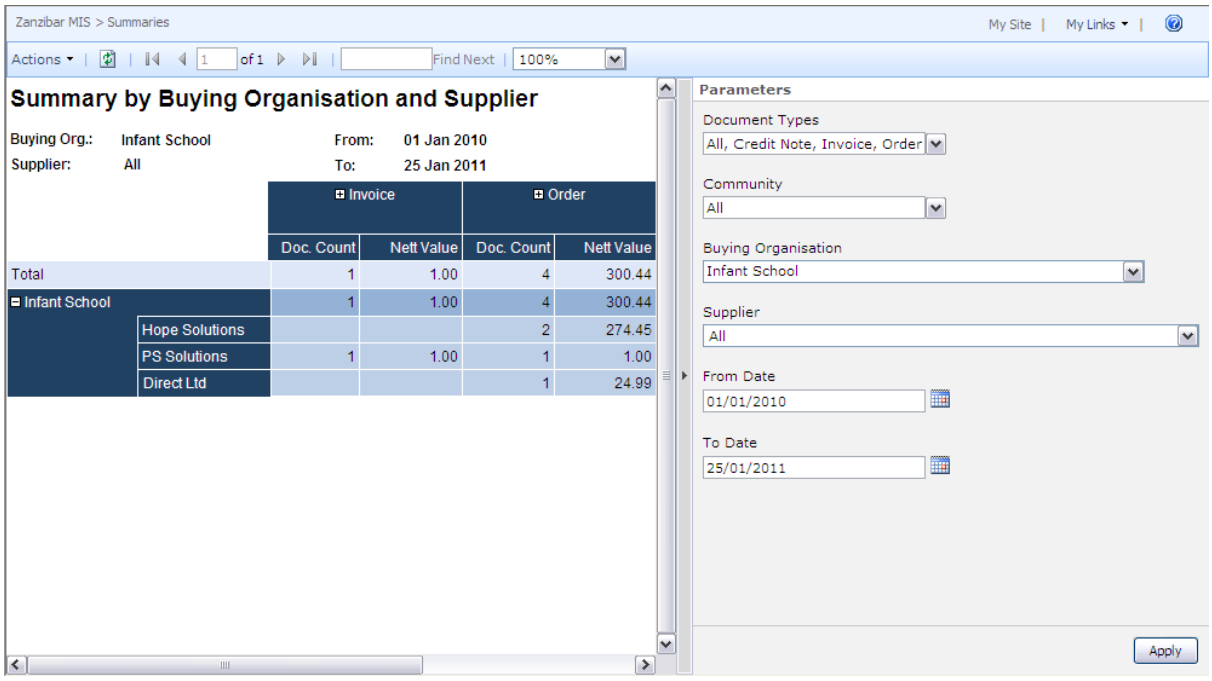
This report provides details on document totals and values by Buying Organisation, grouped by supplier. This particular report format supports row and column groups, which displays as an aggregated summary with the option of drilling down into greater detail based on the header and column data. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system

Example:



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2.5.1.2 Documents by Buying Organisation & UNSPSC Code

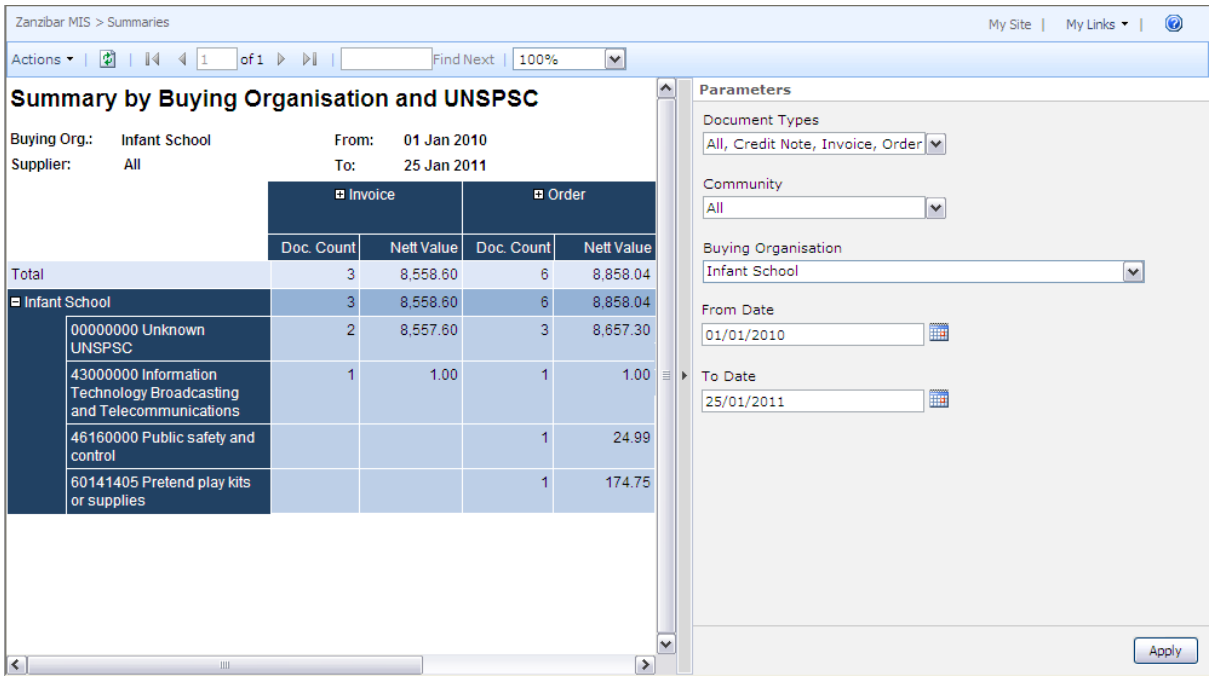
This report provides details on document totals and values by Buying Organisation, grouped by UNSPSC Code. This particular report format supports row and column groups, which displays as an aggregated summary with the option of drilling down into greater detail based on the header and column data. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system

Example:



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2.5.1.3 Documents by Supplier & Buying Organisation

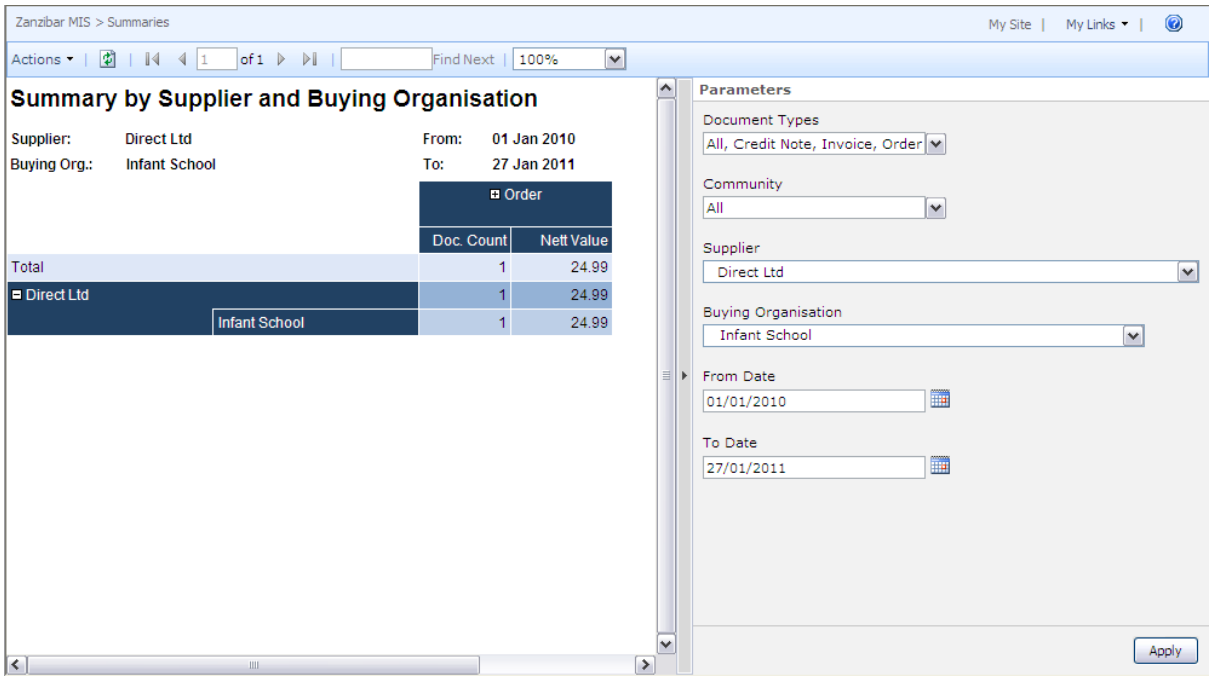
This report provides details on document totals and values by Supplier, grouped by Buying Organisation. This particular report format supports row and column groups, which displays as an aggregated summary with the option of drilling down into greater detail based on the header and column data. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system

Example:



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2.5.1.4 Documents by Supplier & UNSPSC Code

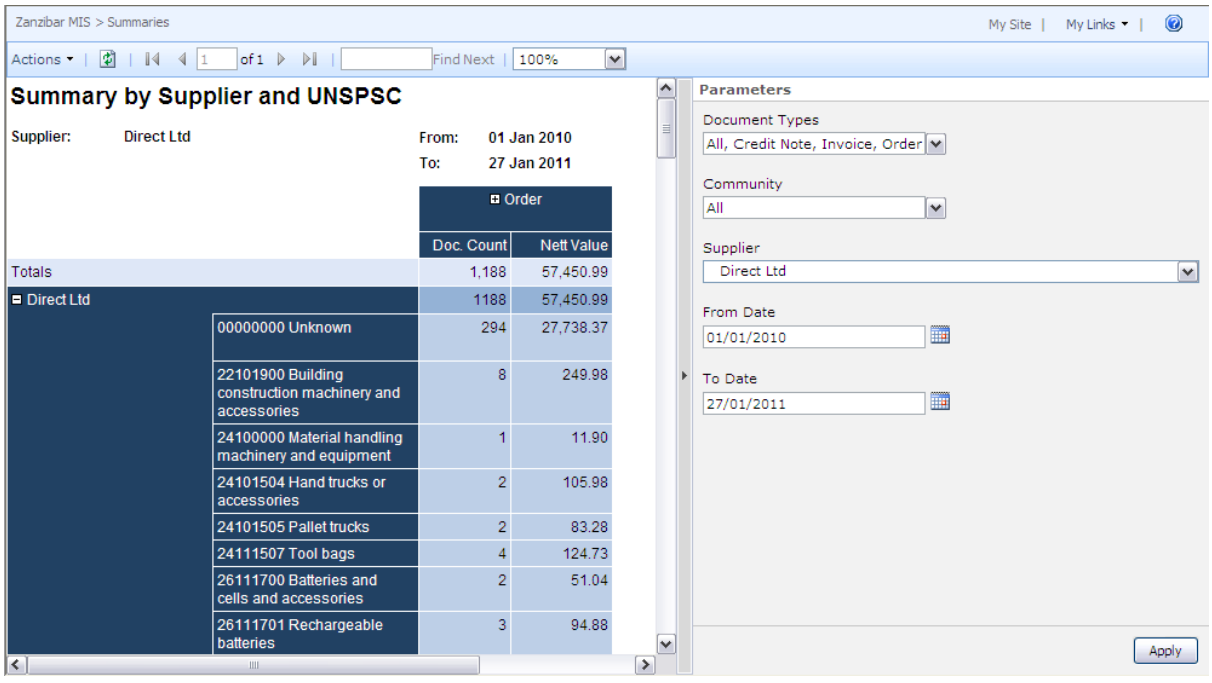
This report provides details on document totals and values by Supplier, grouped by UNSPSC Code. This particular report format supports row and column groups, which displays as an aggregated summary with the option of drilling down into greater detail based on the header and column data. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system

Example:



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2.5.1.5 Documents by UNSPSC Code & Buying Organisation

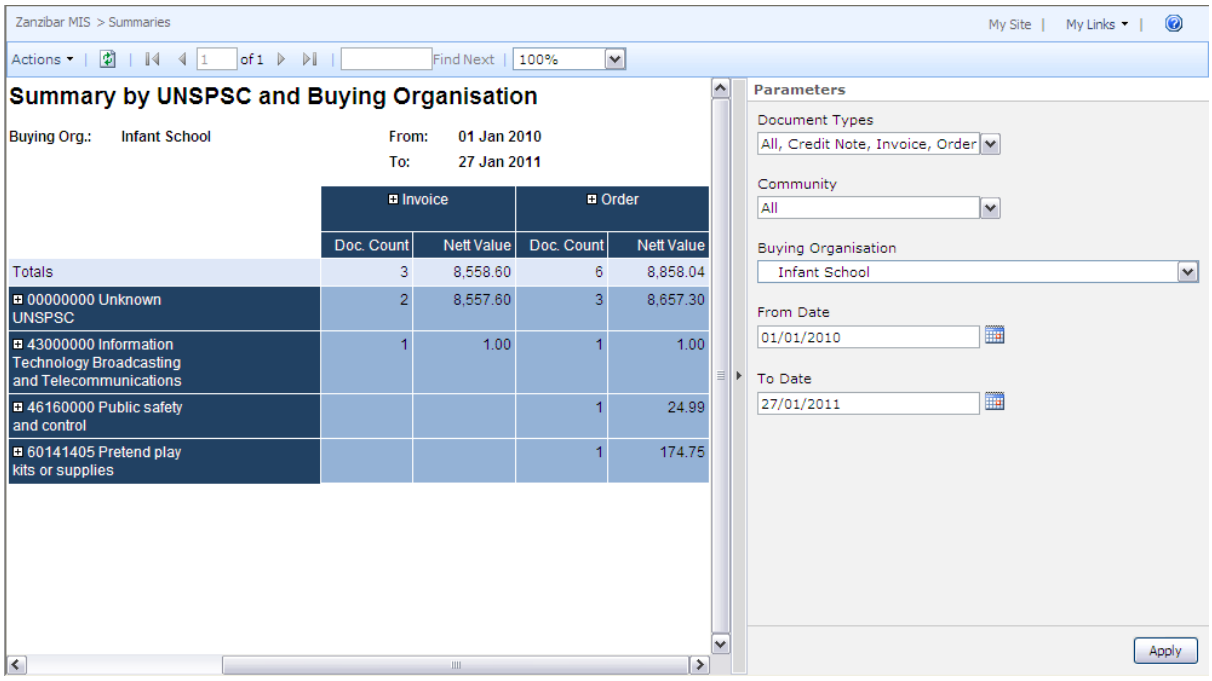
This report provides details on document totals and values by UNSPSC Code, grouped by Buying Organisation. This particular report format supports row and column groups, which displays as an aggregated summary with the option of drilling down into greater detail based on the header and column data. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system

Example:



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2.5.1.6 Documents by UNSPSC Code & Supplier

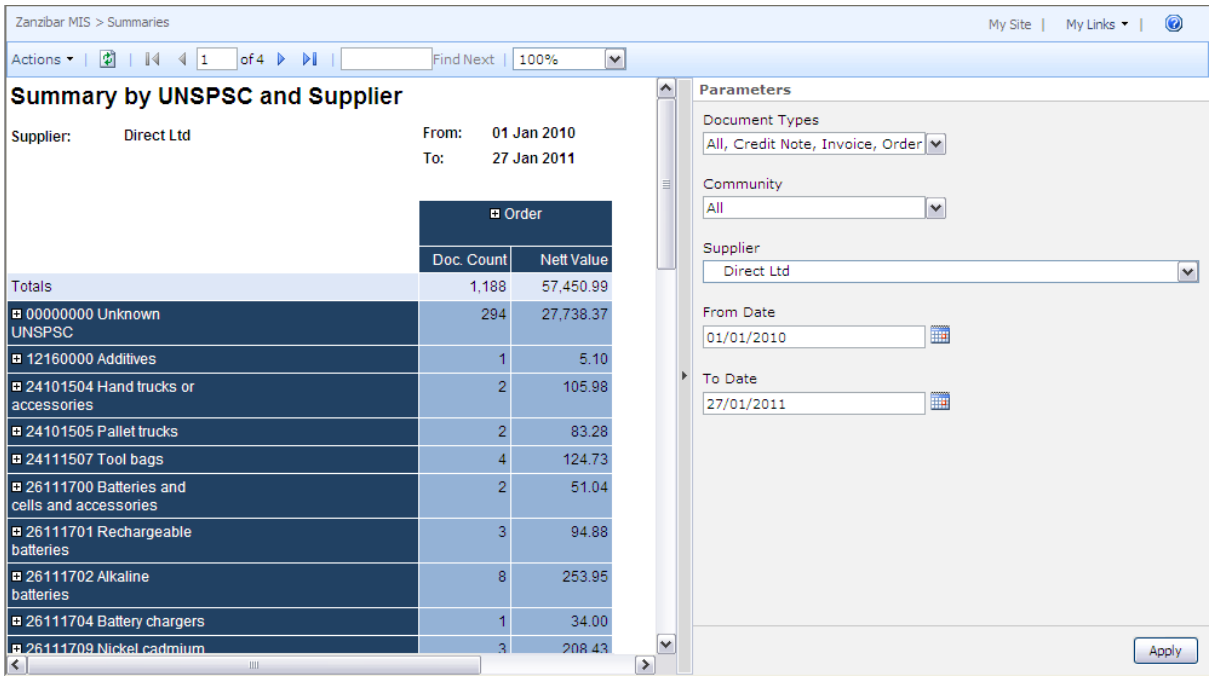
This report provides details on document totals and values by UNSPSC Code, grouped by Supplier. This particular report format supports row and column groups, which displays as an aggregated summary with the option of drilling down into greater detail based on the header and column data. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system

Example:



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2.5.1.7 Top Buying Organisations Column Chart

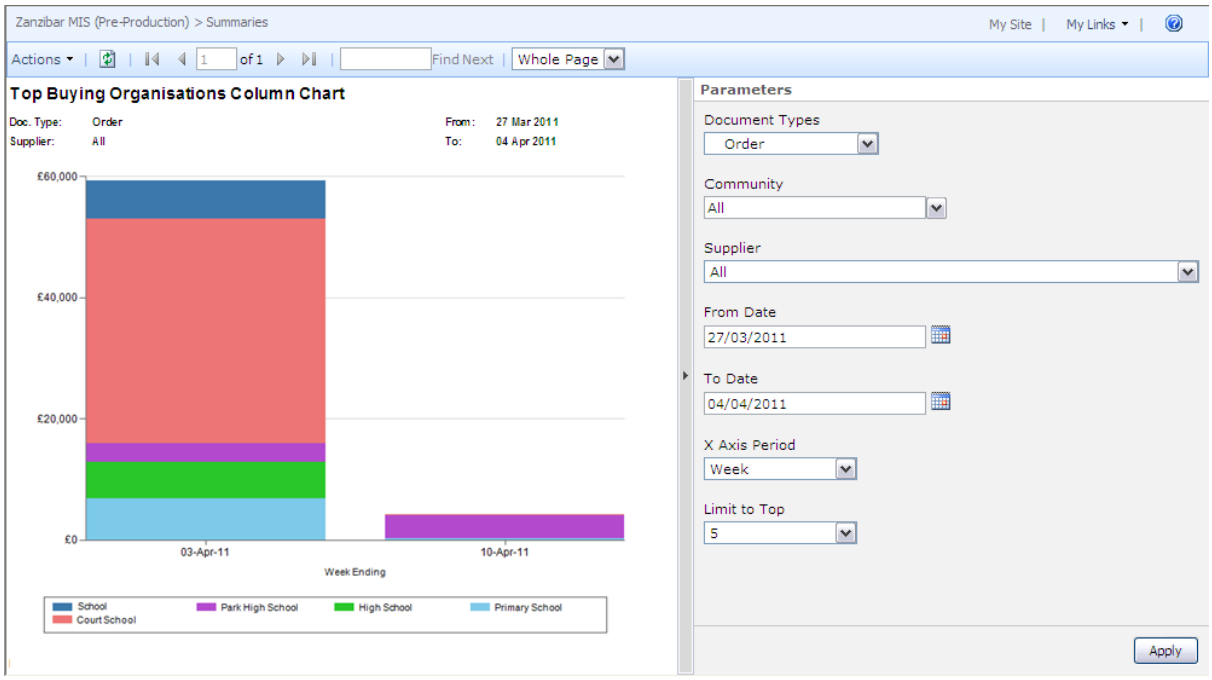
This report provides details on the biggest spending buying organisations by value over a defined date period. This is a column chart report and the data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system
X Axis Period	Allows the user to select a specific display period	Can select Week or Month
Limit to Top	Allows the user to select the number of organisations to limit to	A numeric value from 1 to 5 then 10, 15 & 20

Example:



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2.5.1.8 Top Suppliers Column Chart

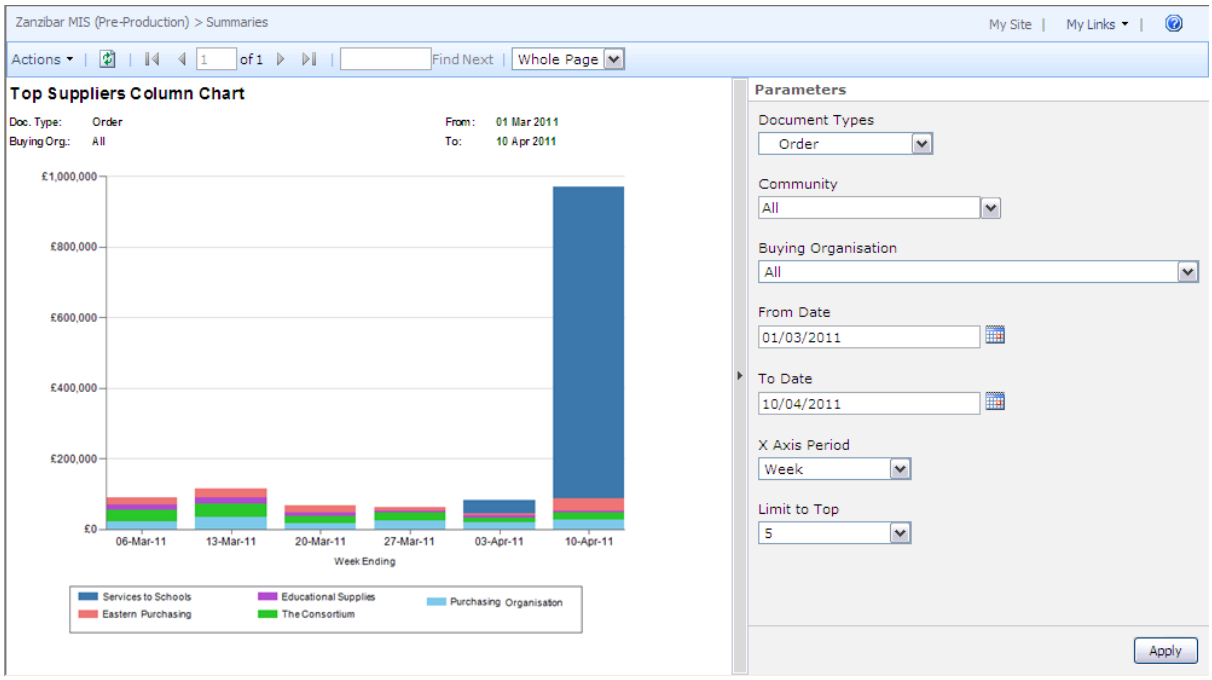
This report provides details on the most spent with suppliers by value over a defined date period. This is a column chart report and the data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system
X Axis Period	Allows the user to select a specific display period	Can select Week or Month
Limit to Top	Allows the user to select the number of organisations to limit to	A numeric value from 1 to 5 then 10, 15 & 20

Example:



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2.5.1.9 Transaction Value Graph

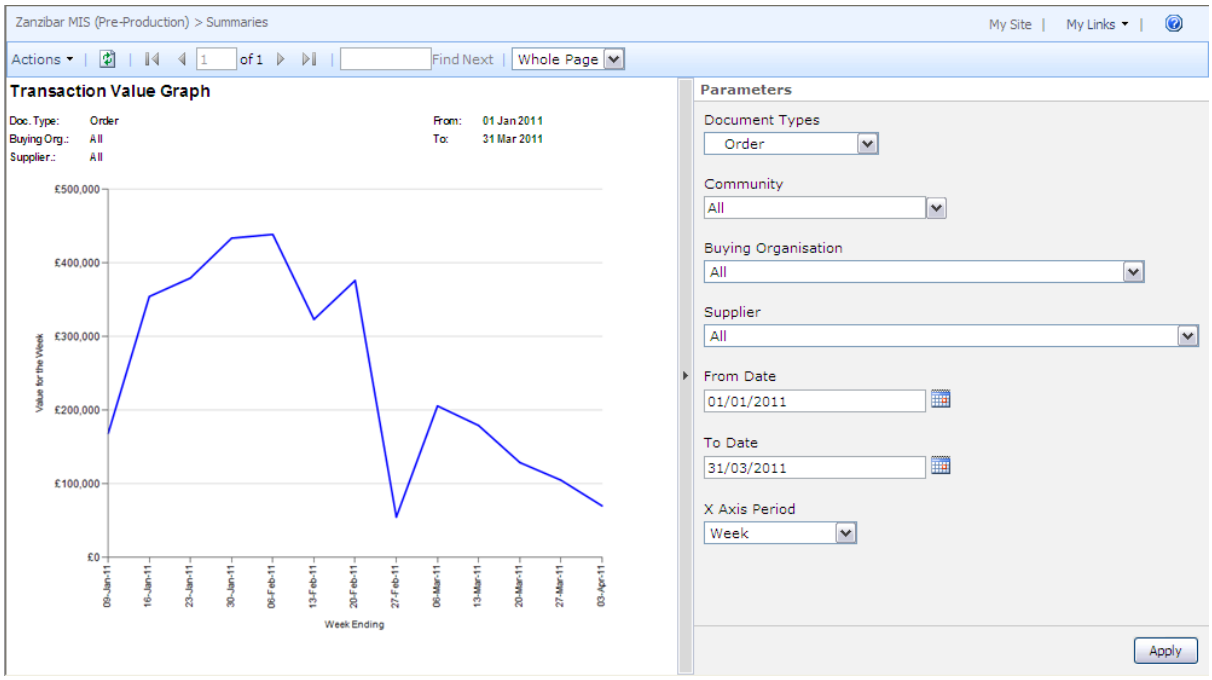
This report is a line chart showing the total transaction values based on a user defined time period covering both buyers and suppliers. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system
X Axis Period	Allows the user to select a specific display period	Can select Week or Month

Example:



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2.5.1.10 Transaction Volume Graph

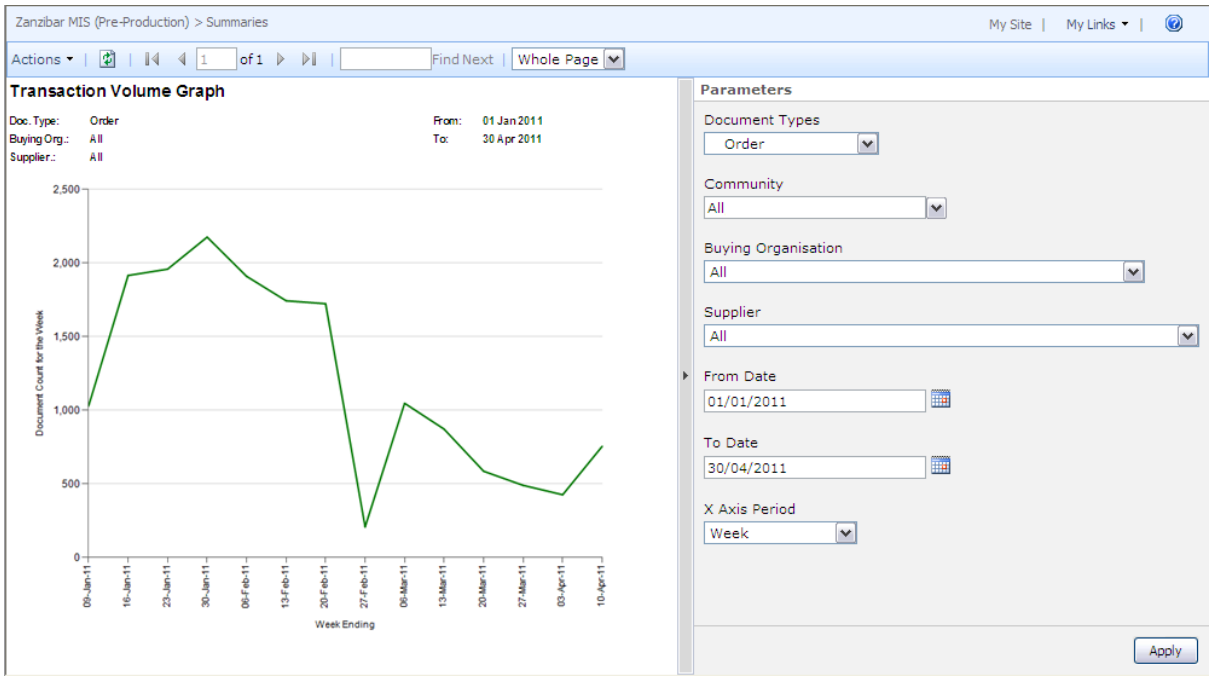
This report is a line chart showing the total transaction volumes based on a user defined time period covering both buyers and suppliers. The data can be exported into the following formats:

- XML file with report data
- CSV (comma separated values)
- Acrobat (PDF)
- HTML (web archive)
- MS Excel
- TIFF
- MS Word

The report has a number of parameters which allows the user to tailor the output based on a number of variables:

Parameter	Description	Values
Document Type	Allows the user to select a document type processed by Buying Organisation(s)	Document types available to that Community or Buying Organisation
Community	Allows the user to select an individual, multiple or all communities	Communities based on the access rights of the user
Buying Organisation	Allows the user to select a Buying organisation from those available to them	Buying Organisations available to that user
Supplier	Allows the user to select a Supplier from those available to their Buying Organisations	Suppliers available to that user
From Date	Allows the user to select a specific date	Dates available on the system
To Date	Allows the user to select a specific date	Dates available on the system
X Axis Period	Allows the user to select a specific display period	Can select Week or Month

Example:



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2.5.2 Drill Down Reports Tab

This report group contains a number of reports that are dynamic and allow you to drill down to the view the individual transactions that form the consolidated values. The reports are grouped into different "transaction" folders, within the "PO Reports" folder the following reports are available:

Purchase Orders by SBO (Matrix)
Purchase Orders UNSPSC by SBO (Matrix)
Purchase Orders UNSPSC by Supplier (Matrix)
Purchase Order Analysis (Matrix)
Purchase Orders by UNSPSC (EWS)
Purchase Order Analysis (EWS)
Purchase Orders by Supplier (Matrix)
Within the "Invoice Reports" the following reports are available:
Invoice Analysis (Matrix)
Invoices by SBO (Matrix)
Invoices by Supplier (Matrix)
Invoices UNSPSC by SBO (Matrix)
Invoice UNSPSC by Supplier (Matrix)

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2.5.2.1 Purchase Order Reports

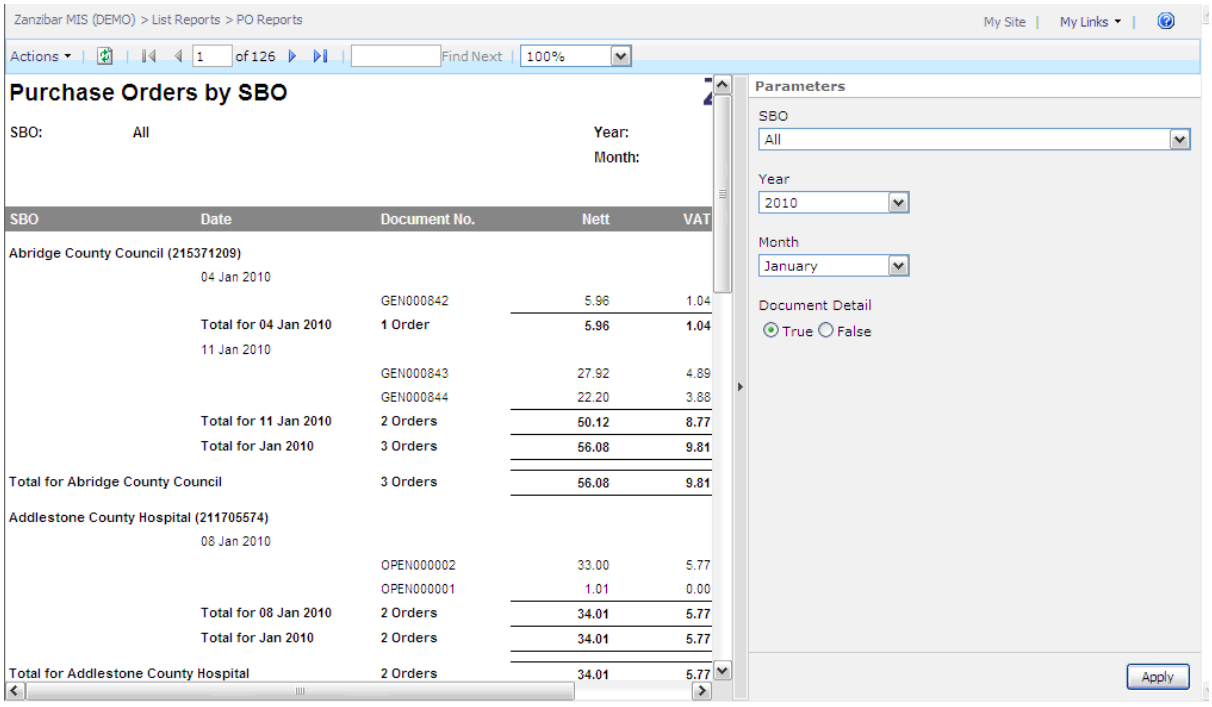
2.5.2.1.1 Purchase Orders by SBO (Matrix)

This report provides details on spend and volumes, grouped by buying organisation. This particular report format supports row and column groups, which can display aggregated summary data in the cells which allow drill-down from the buying organisation to the supplier. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 126 | Find Next | 100%
Purchase Orders by SBO
SBO: All
Year:
Month:
SBO Date Document No. Nett VAT
Abridge County Council (215371209)
04 Jan 2010
GEN000842 5.96 1.04
Total for 04 Jan 2010 1 Order 5.96 1.04
11 Jan 2010
GEN000843 27.92 4.89
GEN000844 22.20 3.88
Total for 11 Jan 2010 2 Orders 50.12 8.77
Total for Jan 2010 3 Orders 56.08 9.81
Total for Abridge County Council 3 Orders 56.08 9.81
Addlestone County Hospital (211705574)
08 Jan 2010
OPEN000002 33.00 5.77
OPEN000001 1.01 0.00
Total for 08 Jan 2010 2 Orders 34.01 5.77
Total for Jan 2010 2 Orders 34.01 5.77
Total for Addlestone County Hospital 2 Orders 34.01 5.77
Parameters
SBO
All
Year
2010
Month
January
Document Detail
True False
Apply

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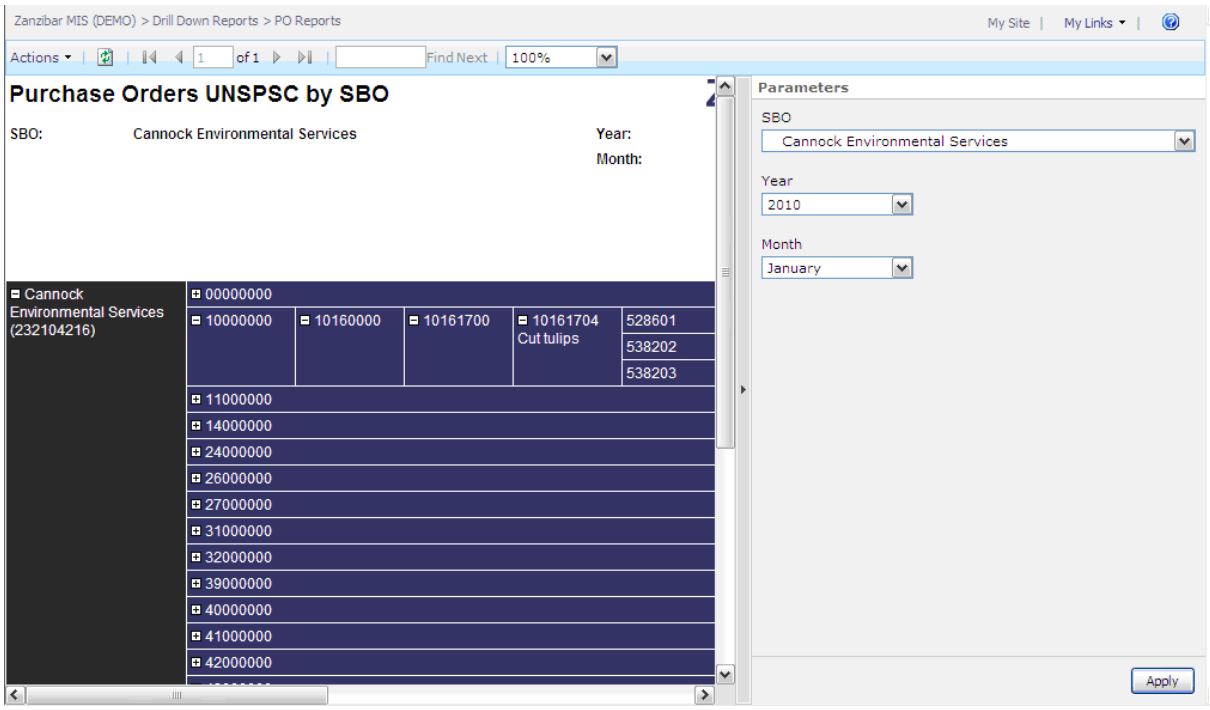
2.5.2.1.2 Purchase Orders UNSPSC by SBO (Matrix)

This report provides details on spend and volumes, grouped by buying organisation with drill-down through the UNSPSC structure, with the lowest level displaying the individual item code. This particular report format supports row and column groups, which can display aggregated summary data in the cells. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months

Example:

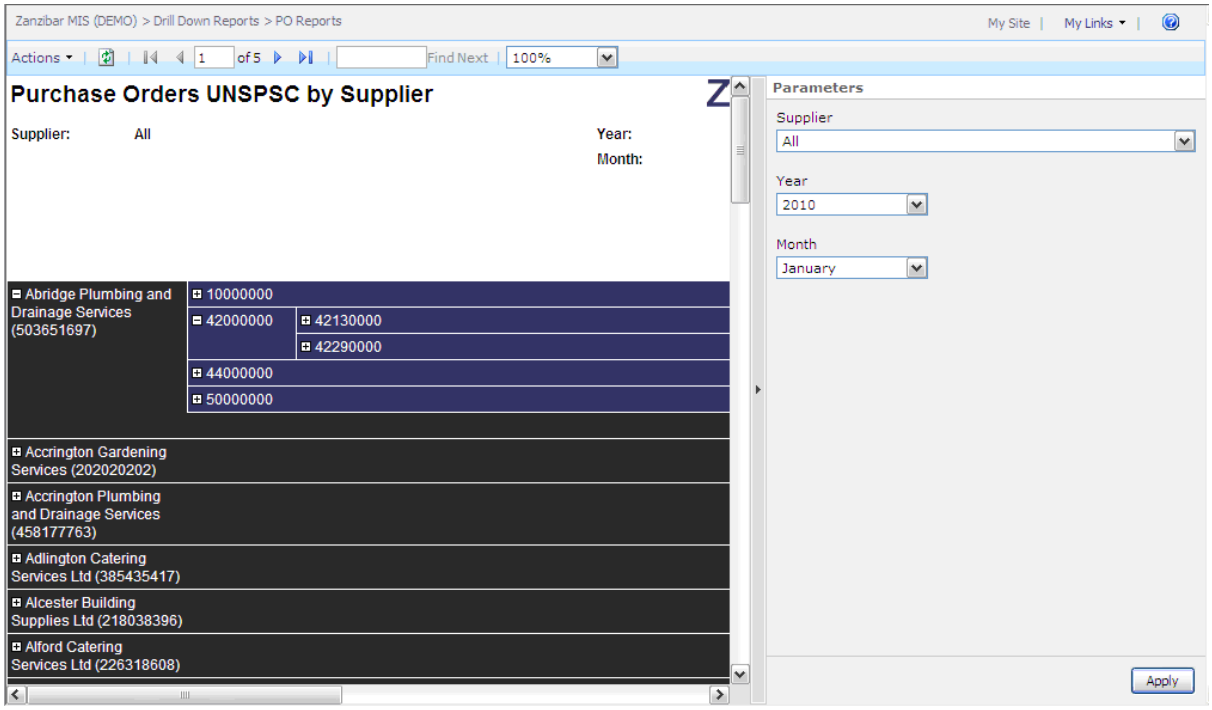


2.5.2.1.3 Purchase Orders UNSPSC by Supplier (Matrix)

This report provides details on spend and volumes, grouped by supplier with drill-down through the UNSPSC structure, with the lowest level displaying the individual item code. This particular report format supports row and column groups, which can display aggregated summary data in the cells. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months



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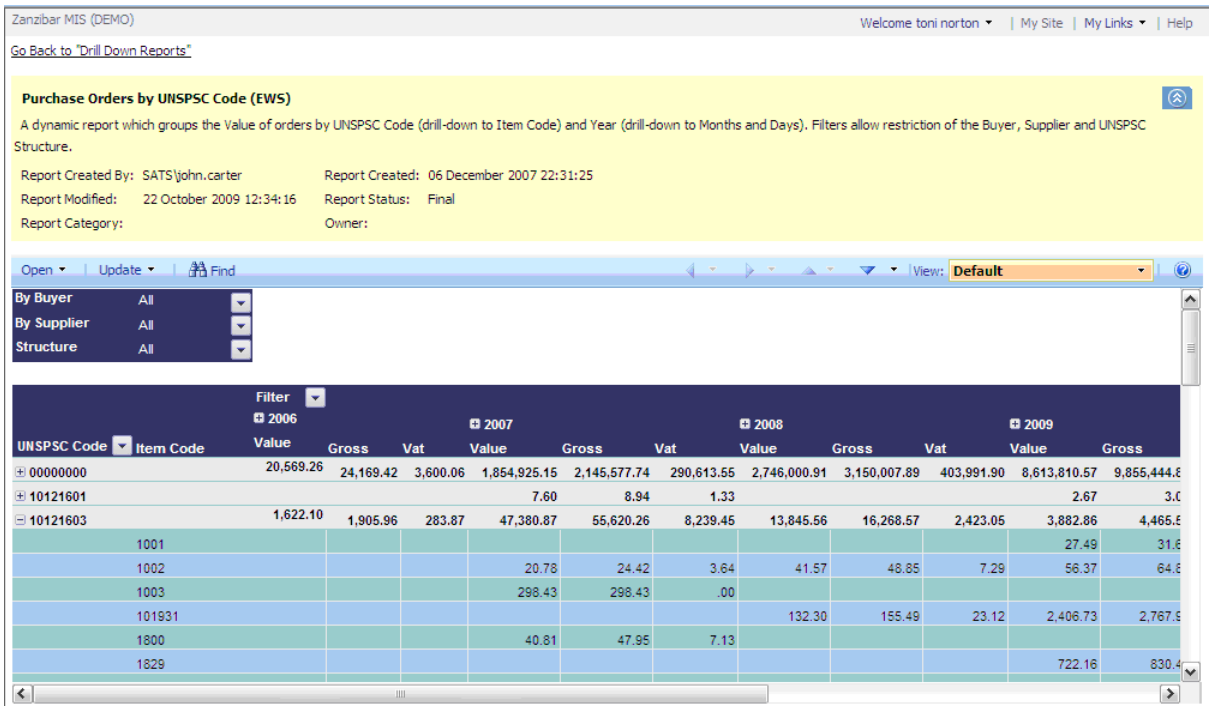
2.5.2.1.4 Purchase Orders by UNSPSC (EWS)

This report groups the value of orders by UNSPSC Code (drill-down to Item Code) and Year (drill-down to Months and Days). Available for export into Excel.

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Date	Allows the user to select specific dates or date ranges	Specific dates, date ranges
Structure	Allows the user to select specific or groups of UNSPSC codes	UNSPSC codes available to that user

Example:

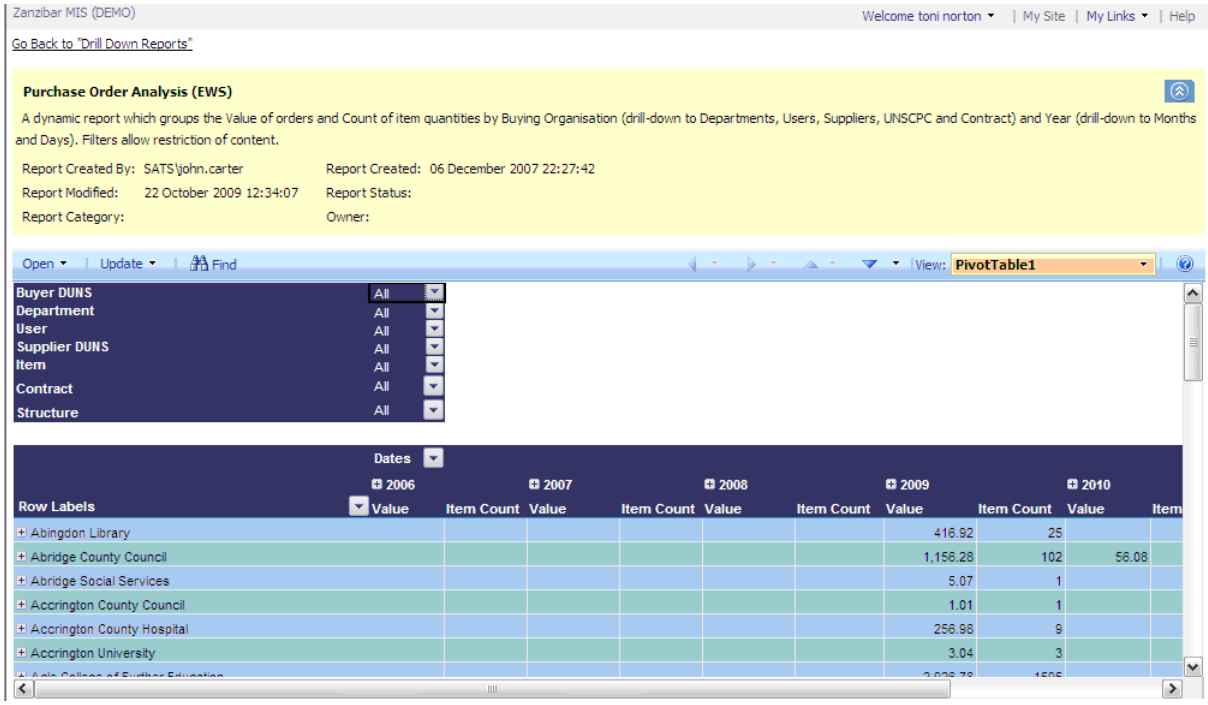

Zanzibar MIS (DEMO)
Welcome toni norton
My Site
My Links
Help
Go Back to "Drill Down Reports"
Purchase Orders by UNSPSC Code (EWS)
A dynamic report which groups the Value of orders by UNSPSC Code (drill-down to Item Code) and Year (drill-down to Months and Days). Filters allow restriction of the Buyer, Supplier and UNSPSC Structure.
Report Created By: SATS\john.carter
Report Created: 06 December 2007 22:31:25
Report Modified: 22 October 2009 12:34:16
Report Status: Final
Report Category:
Owner:
Open
Update
Find
View: Default
By Buyer All
By Supplier All
Structure All
Filter
2006
2007
2008
2009
UNSPSC Code
Item Code
Value
Gross
Vat
00000000 20,569.26 24,169.42 3,600.06 1,854,925.15 2,145,577.74 290,613.55 2,746,000.91 3,150,007.89 403,991.90 8,613,810.57 9,855,444.8
10121601 7.60 8.94 1.33 2.67 3.0
10121603 1,622.10 1,905.96 283.87 47,380.87 55,620.26 8,239.45 13,845.56 16,268.57 2,423.05 3,882.86 4,465.8
1001 27.49 31.6
1002 20.78 24.42 3.64 41.57 48.85 7.29 56.37 64.8
1003 298.43 298.43 .00
101931 132.30 155.49 23.12 2,406.73 2,767.9
1800 40.81 47.95 7.13
1829 722.16 830.4

2.5.2.1.5 Purchase Order Analysis (EWS)

This report shows the value of the orders and a count of the number of orders with drill-down within Buyer or Supplier (Multi-view) to Document Reference and then Item Code. Available for export into Excel.

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Department	Allows the user to select specific departments if populated in the Purchase Orders	Departments that are available to the user, if the department has been populated in the Purchase Order
User	Allows the user to select specific users	Users available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Item	Allows the user to select required the item code(s)	Item codes available to that user
Contract	Allows the user to select required Contract Reference number(s)	Contract Reference numbers available to that user
Structure	Allows the user to select required UNSPSC code(s)	UNSPSC codes available to that user
Date	Allows the user to select specific dates or date ranges	Specific dates, date ranges

Example:


Zanzibar MIS (DEMO)
Welcome toni norton | My Site | My Links | Help
Go Back to "Drill Down Reports"
Purchase Order Analysis (EWS)
A dynamic report which groups the Value of orders and Count of item quantities by Buying Organisation (drill-down to Departments, Users, Suppliers, UNSCPC and Contract) and Year (drill-down to Months and Days). Filters allow restriction of content.
Report Created By: SATS\john.carter
Report Created: 06 December 2007 22:27:42
Report Modified: 22 October 2009 12:34:07
Report Status:
Report Category:
Owner:
Open | Update | Find
View: PivotTable1
Buyer DUNS All
Department All
User All
Supplier DUNS All
Item All
Contract All
Structure All
Dates
2006 2007 2008 2009 2010
Row Labels
Value Item Count Value Item Count Value Item Count Value Item Count Value Item
Abingdon Library 416.92 25
Abridge County Council 1,156.28 102 56.08
Abridge Social Services 5.07 1
Accrington County Council 1.01 1
Accrington County Hospital 256.98 9
Accrington University 3.04 3

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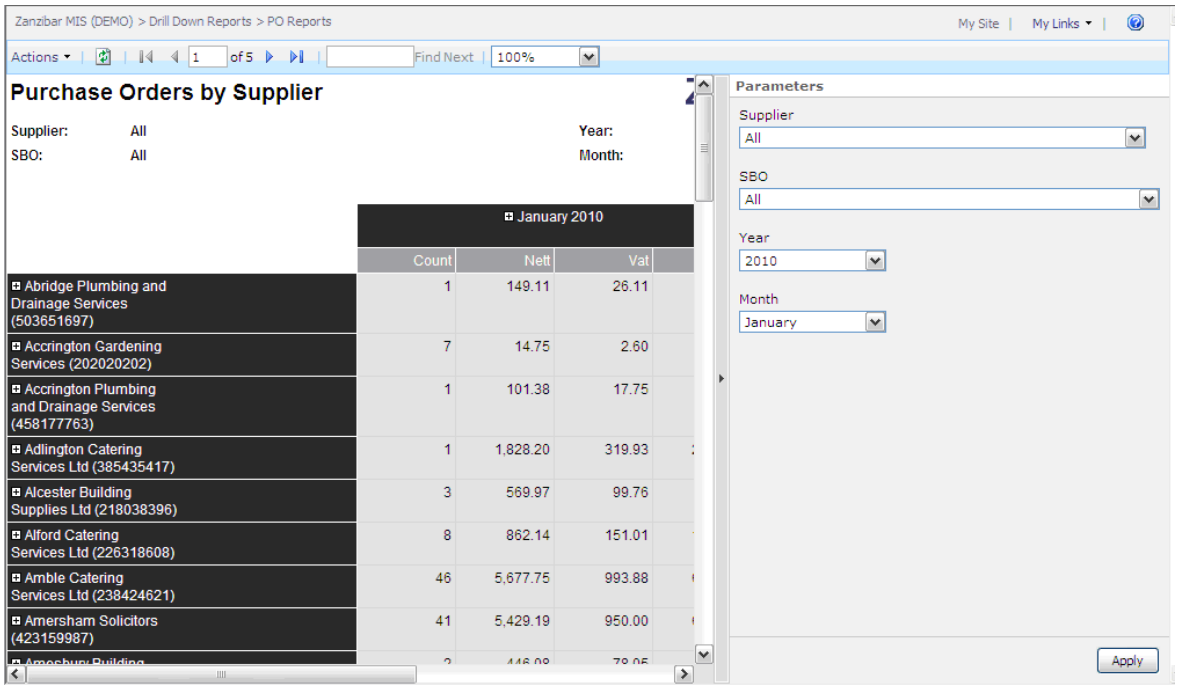
2.5.2.1.6 Purchase Orders by Supplier (Matrix)

This report provides details on spend and volumes, grouped by supplier. This particular report format supports row and column groups, which can display aggregated summary data in the cells which allow drill-down from the supplier to the buying organisation. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months

Example:



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2.5.3 Chart Reports Tab

This report group contains a number of reports that display as column charts. The reports are grouped into different "transaction" folders. Within the "PO Reports" folder the following reports are available:

Purchase Orders by SBO and Supplier (Column)
Purchase Orders by Supplier and SBO (Column)
Within the "Invoice Reports" folder the following reports are available:
Invoices by SBO and Supplier (Column)
Invoices by Supplier and SBO (Column)

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2.5.3.1 Purchase Order Reports

2.5.3.1.1 Purchase Orders by SBO and Supplier (Column)

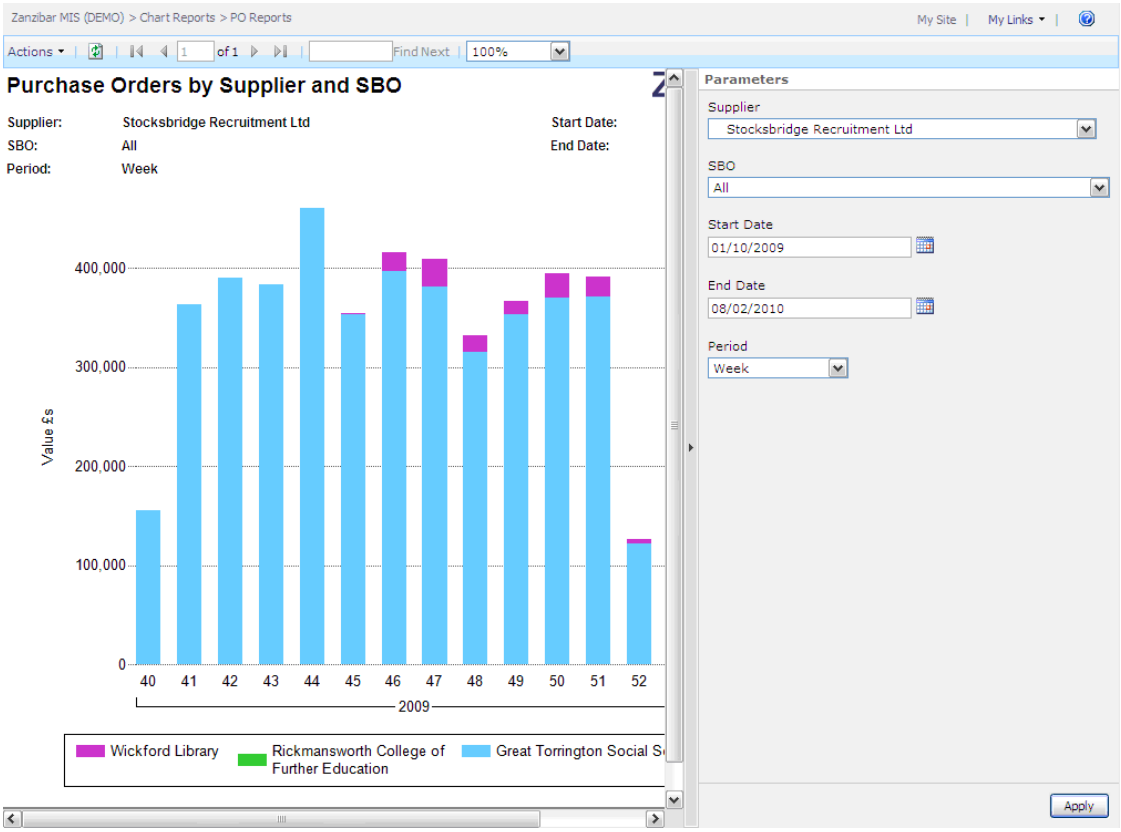
This report will show the time across the bottom axis and the value of orders on the side; each colour represents a different buyer. Filters will allow the restriction of the Buyer, Supplier and Date with an option to select the reporting time period.

A bar-chart reporting value of orders with one column bar per time period, colour-coded to show each Buying Organisation's value of orders. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Start date	Allows the user to select a start date	Any date
End date	Allows the user to select an end date	Any date
Period	Allows the user to modify the reporting period within date range	Quarter, Month, Week, Day

Example:



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2.5.3.2 Invoice Reports

2.5.3.2.1 Invoices by SBO and Supplier (Column)

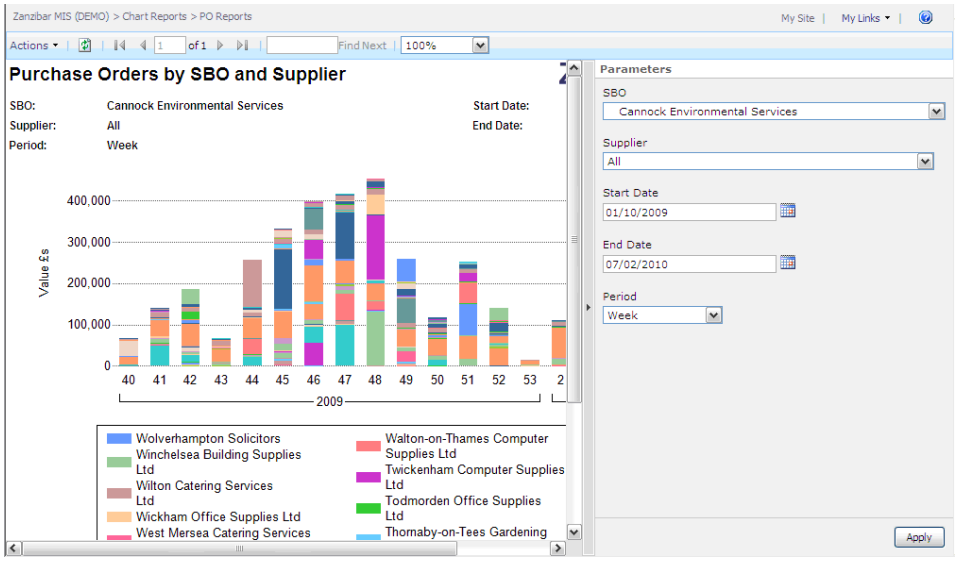
This report will show the time across the bottom axis and the value of invoices on the side; each colour represents a different buyer. Filters will allow the restriction of the Buyer, Supplier and Date with an option to select the reporting time period.

A bar-chart reporting value of orders with one column bar per time period, colour-coded to show each Supplier's value of Orders. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allow s the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allow s the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Start date	Allow s the user to select a start date	Any date
End date	Allow s the user to select an end date	Any date
Period	Allow s the user to modify the reporting period w ithin date range	Quarter, Month, Week, Day

Example:



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2.5.4 List Reports Tab

This report group contains a number of reports that are dynamic and allow you to drill down to then view the individual transactions that form the consolidated values. The reports are grouped into different "transaction" folders, within the "PO Reports" folder the following reports are available:

Line Item Search by SBO and Supplier (List)
Purchase Orders by SBO (List)
Purchase Orders by SBO and Supplier (List)
Purchase Orders by Supplier (List)
Supplier Evaluation Report (List)
Minimum Value Purchase Orders by SBO (List)
Purchase Order Details (List)
Line Items by SBO and Supplier (List)
Monthly Analysis (List)
Within the "Invoice Reports" folder the following reports are available:
Invoice Details (List)
Invoices by SBO (List)
Invoices by SBO and Supplier (List)
Invoices by Supplier (List)
Invoice Line Item Search by SBO and Supplier (List)
Invoice Line Items by SBO and Supplier (List)
Invoice Minimum Value Invoices by SBO (List)
Invoices Monthly Analysis (List)
Invoices Supplier Evaluation Report (List)

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2.5.4.1 Purchase Order Reports

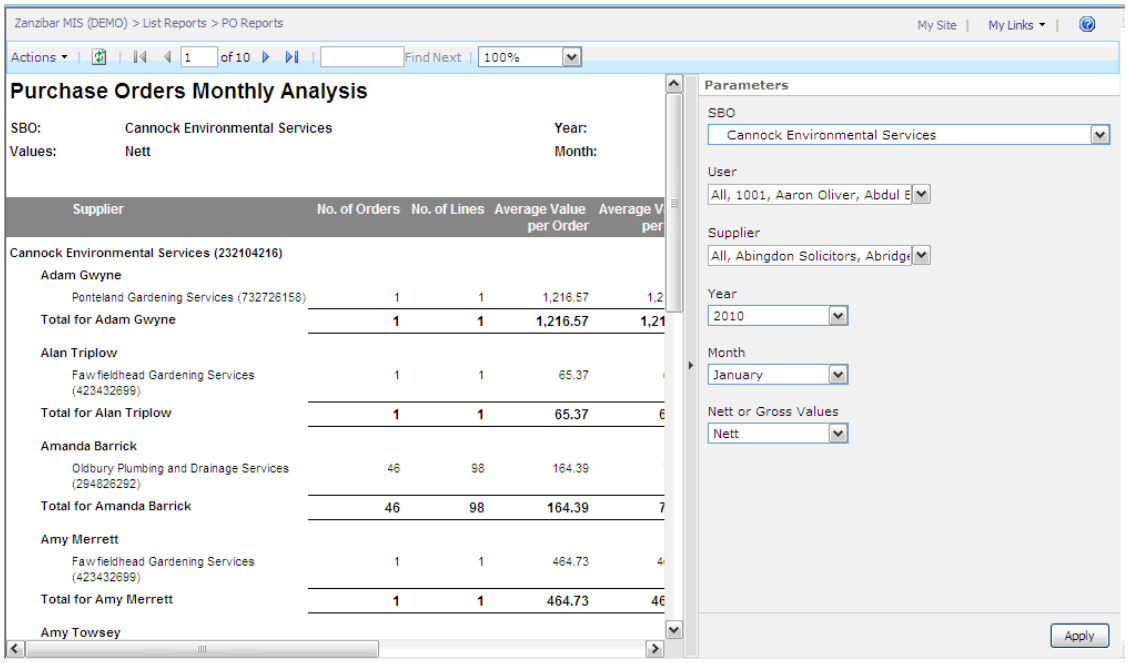
2.5.4.1.1 Purchase Orders Monthly Analysis (List)

This report provides details on spend, volumes (orders and lines) and includes averages for orders and lines. The data is grouped by buying organisation, end user (i.e. the user that created the order if recorded) and then supplier. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
User	Allows the user to select specific users	Users available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Nett or Gross Values	Allows the user to select whether to report on Nett or Gross Values	Nett or Gross

Example:



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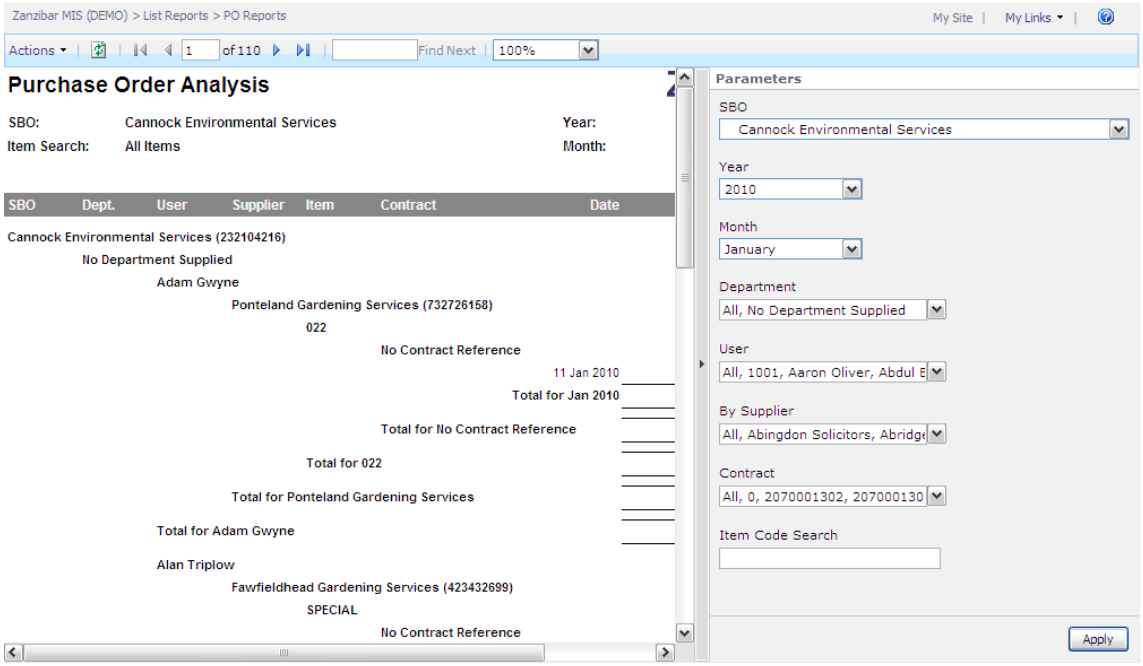
2.5.4.1.2 Purchase Order Analysis

This report provides details on transactions and groups the data by buying organisation, department, end user, supplier, item code, contract and date. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Department	Allows the user to select specific departments if populated in the Purchase Orders	Departments that are available to the user, if the department has been populated in the Purchase Order
User	Allows the user to select specific users	Users available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Contract	Allows the user to select specific Contract Reference numbers	Contract Reference numbers available to that user
Item Code Search	Free Text field to allow user to search the Line Items by Item Code	Free Text

Example:



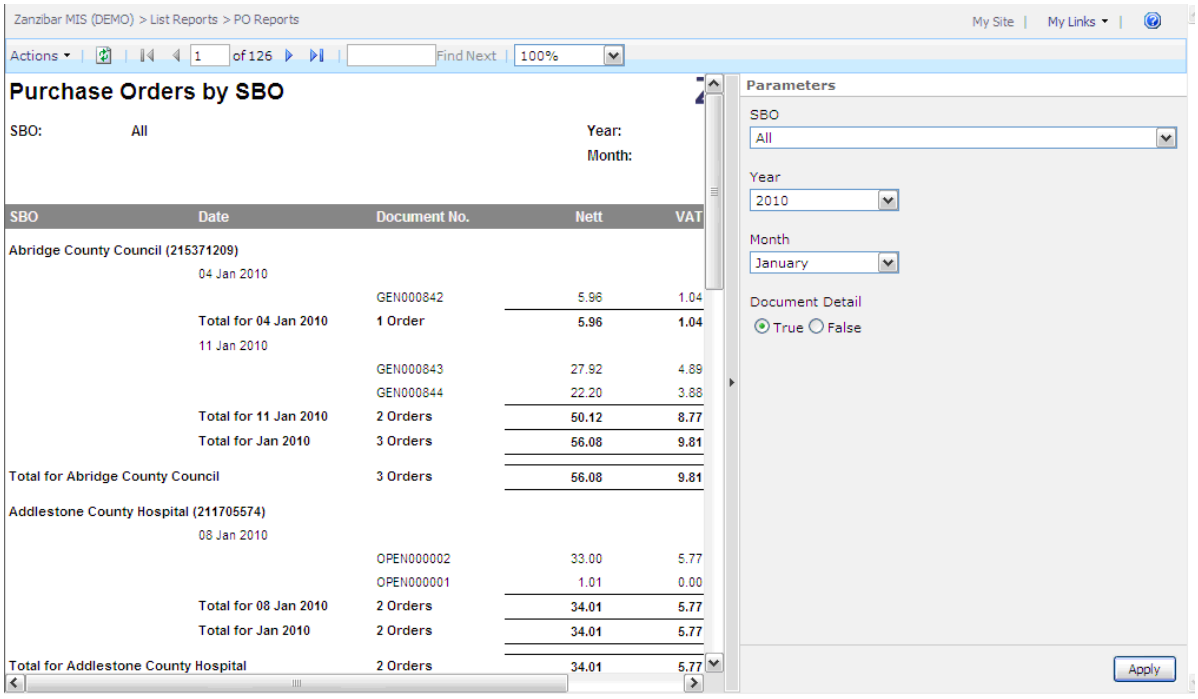
2.5.4.1.3 Purchase Orders by SBO (List)

This report provides details on spend and volumes, grouped by buying organisation and date. The user can choose whether to display the document details. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Document Detail	Allows the user to choose between a detailed or summary view	True or False

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 126 | Find Next | 100%
Purchase Orders by SBO
SBO: All
Year:
Month:
SBO Date Document No. Nett VAT
Abridge County Council (215371209)
04 Jan 2010
GEN000842 5.96 1.04
Total for 04 Jan 2010 1 Order 5.96 1.04
11 Jan 2010
GEN000843 27.92 4.89
GEN000844 22.20 3.88
Total for 11 Jan 2010 2 Orders 50.12 8.77
Total for Jan 2010 3 Orders 56.08 9.81
Total for Abridge County Council 3 Orders 56.08 9.81
Addlestone County Hospital (211705574)
08 Jan 2010
OPEN000002 33.00 5.77
OPEN000001 1.01 0.00
Total for 08 Jan 2010 2 Orders 34.01 5.77
Total for Jan 2010 2 Orders 34.01 5.77
Total for Addlestone County Hospital 2 Orders 34.01 5.77
Parameters
SBO
All
Year
2010
Month
January
Document Detail
True False
Apply

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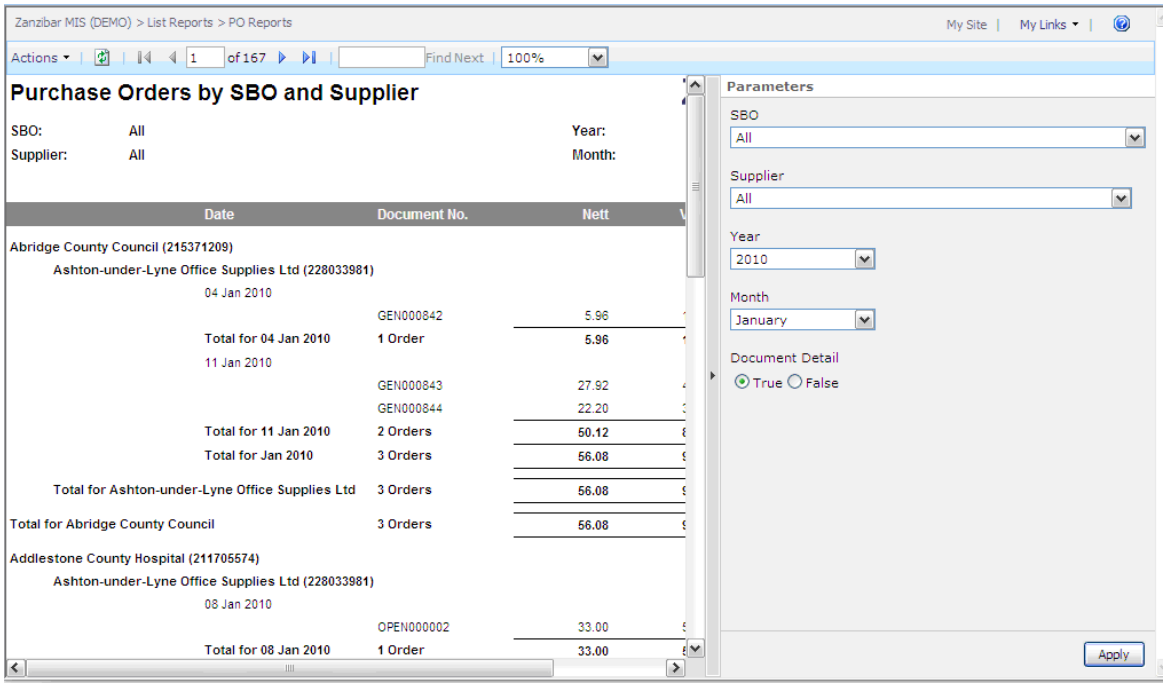
2.5.4.1.4 Purchase Orders by SBO and Supplier (List)

This report provides details on spend and volumes including the document reference. The report is grouped by buying organisation, supplier and date. The user can choose whether to display the document details. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Document Detail	Allows the user to choose between a detailed or summary view	True or False

Example:



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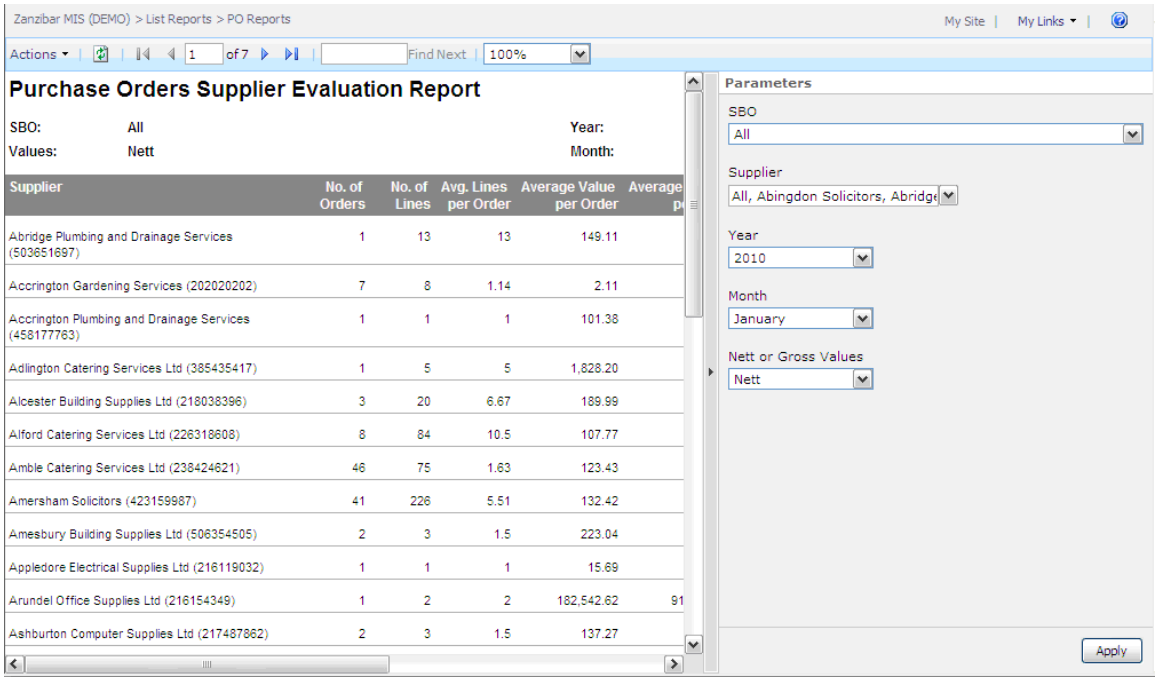
2.5.4.1.5 Purchase Orders by Supplier (List)

This report provides details on spend and volumes, grouped by supplier and date. The user can choose whether to display the document details. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Nett or Gross Values	Allows the user to select whether to report on Nett or Gross Values	Nett or Gross

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 7 | Find Next | 100%
Purchase Orders Supplier Evaluation Report
SBO: All
Values: Nett
Year:
Month:
Supplier
No. of Orders
No. of Lines
Avg. Lines per Order
Average Value per Order
Abridge Plumbing and Drainage Services (503651697) 1 13 13 149.11
Accrington Gardening Services (202020202) 7 8 1.14 2.11
Accrington Plumbing and Drainage Services (458177763) 1 1 1 101.38
Adlington Catering Services Ltd (385435417) 1 5 5 1,828.20
Alcester Building Supplies Ltd (218038396) 3 20 6.67 189.99
Alford Catering Services Ltd (226318608) 8 84 10.5 107.77
Amble Catering Services Ltd (238424621) 46 75 1.63 123.43
Amersham Solicitors (423159987) 41 226 5.51 132.42
Amesbury Building Supplies Ltd (506354505) 2 3 1.5 223.04
Appledore Electrical Supplies Ltd (216119032) 1 1 1 15.69
Arundel Office Supplies Ltd (216154349) 1 2 2 182,542.62 91
Ashburton Computer Supplies Ltd (217487862) 2 3 1.5 137.27
Parameters
SBO
All
Supplier
All, Abingdon Solicitors, Abridge
Year
2010
Month
January
Nett or Gross Values
Nett
Apply

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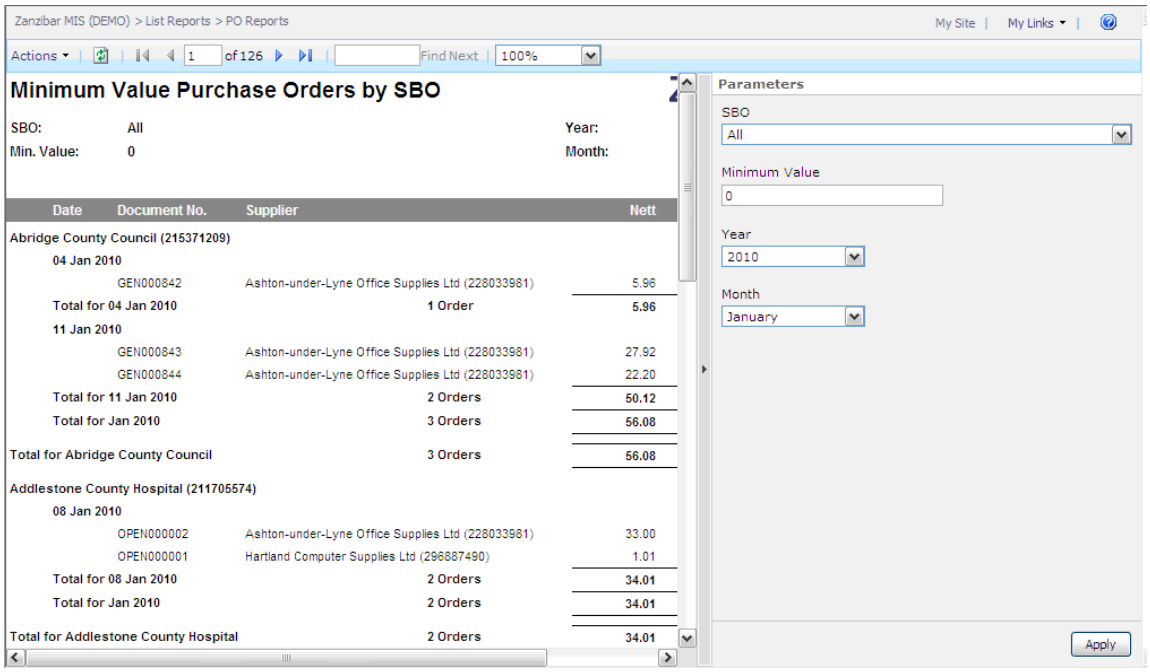
2.5.4.1.6 Minimum Value Purchase Orders by SBO (List)

This report will display all purchase order transactions that have a minimum order greater than that entered in the text box. The details displayed on the report include the document reference, supplier and value of order. This report will group the results by buying organisation and date. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Minimum Value	Allows the user to enter a numerical minimum value	Free Text
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 126 | Find Next | 100%
Minimum Value Purchase Orders by SBO
SBO: All
Min. Value: 0
Year:
Month:
Date Document No. Supplier Nett
Abridge County Council (215371209)
04 Jan 2010
GEN000842 Ashton-under-Lyne Office Supplies Ltd (228033981) 5.96
Total for 04 Jan 2010 1 Order 5.96
11 Jan 2010
GEN000843 Ashton-under-Lyne Office Supplies Ltd (228033981) 27.92
GEN000844 Ashton-under-Lyne Office Supplies Ltd (228033981) 22.20
Total for 11 Jan 2010 2 Orders 50.12
Total for Jan 2010 3 Orders 56.08
Total for Abridge County Council 3 Orders 56.08
Addlestone County Hospital (211705574)
08 Jan 2010
OPEN000002 Ashton-under-Lyne Office Supplies Ltd (228033981) 33.00
OPEN000001 Hartland Computer Supplies Ltd (296887490) 1.01
Total for 08 Jan 2010 2 Orders 34.01
Total for Jan 2010 2 Orders 34.01
Total for Addlestone County Hospital 2 Orders 34.01
Parameters
SBO
All
Minimum Value
0
Year
2010
Month
January
Apply

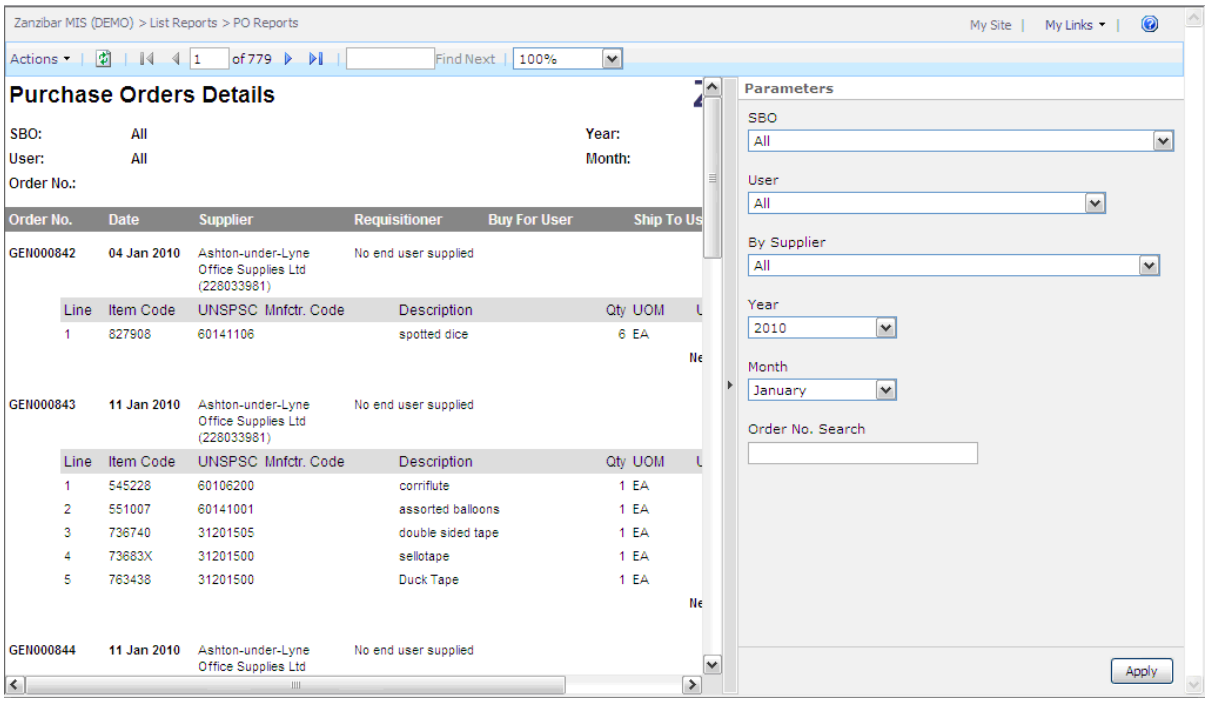
2.5.4.1.7 Purchase Order Details (List)

This report will display all purchase order transactions that meet the entered parameters. This report will group the results by buying organisation and date. The document reference search field is optional. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel.

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
User	Allows the user to select specific users	Users available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Order No. Search	Free Text field to allow user to search the Orders by Order No.	Free Text

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 779 | Find Next | 100%
Purchase Orders Details
SBO: All
User: All
Order No.:
Year:
Month:
Order No. Date Supplier Requisitioner Buy For User Ship To Us
GEN000842 04 Jan 2010 Ashton-under-Lyne Office Supplies Ltd (228033981) No end user supplied
Line Item Code UNSPSC Mnfctr. Code Description Qty UOM
1 827908 60141106 spotted dice 6 EA
GEN000843 11 Jan 2010 Ashton-under-Lyne Office Supplies Ltd (228033981) No end user supplied
Line Item Code UNSPSC Mnfctr. Code Description Qty UOM
1 545228 60106200 corriflute 1 EA
2 551007 60141001 assorted balloons 1 EA
3 736740 31201505 double sided tape 1 EA
4 73683X 31201500 sellotape 1 EA
5 763438 31201500 Duck Tape 1 EA
GEN000844 11 Jan 2010 Ashton-under-Lyne Office Supplies Ltd No end user supplied
Parameters
SBO
All
User
All
By Supplier
All
Year
2010
Month
January
Order No. Search
Apply

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2.5.4.2 Invoice Reports

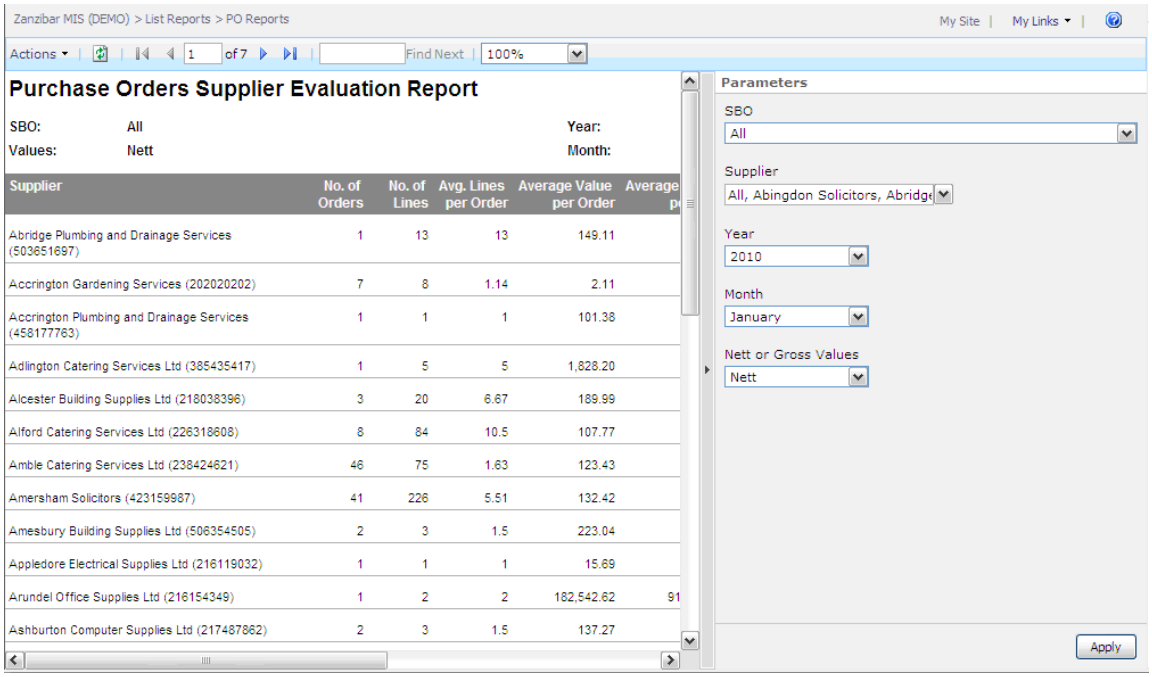
2.5.4.2.1 Invoices Supplier Evaluation Report (List)

This report provides details order statistics by Supplier, including totals and averages of volumes and values of orders and order lines. The data is grouped by supplier. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Nett or Gross Values	Allows the user to select whether to report on Nett or Gross Values	Nett or Gross

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 7 | Find Next | 100%
Purchase Orders Supplier Evaluation Report
SBO: All
Values: Nett
Year:
Month:
Supplier
No. of Orders
No. of Lines
Avg. Lines per Order
Average Value per Order
Abridge Plumbing and Drainage Services (503651697) 1 13 13 149.11
Accrington Gardening Services (202020202) 7 8 1.14 2.11
Accrington Plumbing and Drainage Services (458177763) 1 1 1 101.38
Adlington Catering Services Ltd (385435417) 1 5 5 1,828.20
Alcester Building Supplies Ltd (218038396) 3 20 6.67 189.99
Alford Catering Services Ltd (226318608) 8 84 10.5 107.77
Amble Catering Services Ltd (238424621) 46 75 1.63 123.43
Amersham Solicitors (423159987) 41 226 5.51 132.42
Amesbury Building Supplies Ltd (506354505) 2 3 1.5 223.04
Appledore Electrical Supplies Ltd (216119032) 1 1 1 15.69
Arundel Office Supplies Ltd (216154349) 1 2 2 182,542.62
Ashburton Computer Supplies Ltd (217487862) 2 3 1.5 137.27
Parameters
SBO
All
Supplier
All, Abingdon Solicitors, Abridge
Year
2010
Month
January
Nett or Gross Values
Nett
Apply

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2.5.4.3 Other Reports

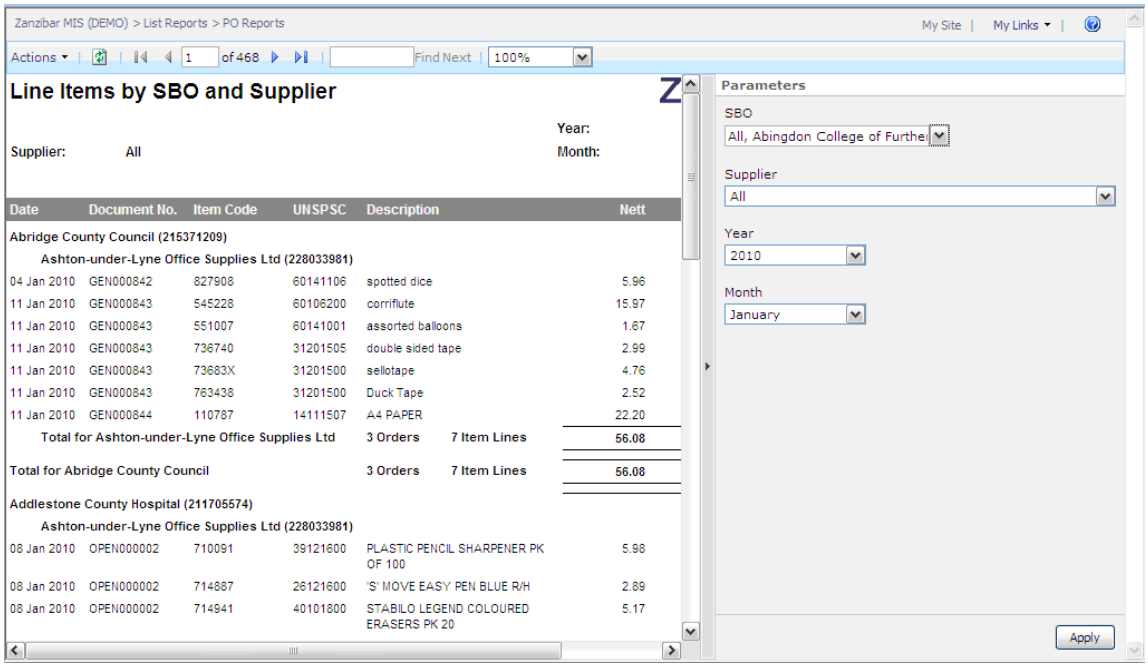
2.5.4.3.1 Line Items by SBO and Supplier (List)

A list of order items, sequenced by Buying Organisation, Supplier and date, with order and item counts and value totals. The details displayed on the report include the document reference, item code, UNSPSC code (where it is supplied) and then the quantity and price. This report will group the results by buying organisation, supplier, and date. It allows filtering by buyer, supplier, and date range. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links
Actions
1 of 468
Find Next
100%
Line Items by SBO and Supplier
Supplier: All
Year:
Month:
Date Document No. Item Code UNSPSC Description Nett
Abridge County Council (215371209)
Ashton-under-Lyne Office Supplies Ltd (228033981)
04 Jan 2010 GEN000842 827908 60141106 spotted dice 5.96
11 Jan 2010 GEN000843 545228 60106200 corriflute 15.97
11 Jan 2010 GEN000843 551007 60141001 assorted balloons 1.67
11 Jan 2010 GEN000843 736740 31201505 double sided tape 2.99
11 Jan 2010 GEN000843 73683X 31201500 sellotape 4.76
11 Jan 2010 GEN000843 763438 31201500 Duck Tape 2.52
11 Jan 2010 GEN000844 110787 14111507 A4 PAPER 22.20
Total for Ashton-under-Lyne Office Supplies Ltd 3 Orders 7 Item Lines 56.08
Total for Abridge County Council 3 Orders 7 Item Lines 56.08
Addlestone County Hospital (211705574)
Ashton-under-Lyne Office Supplies Ltd (228033981)
08 Jan 2010 OPEN000002 710091 39121600 PLASTIC PENCIL SHARPENER PK OF 100 5.98
08 Jan 2010 OPEN000002 714887 26121600 'S' MOVE EASY PEN BLUE R/H 2.89
08 Jan 2010 OPEN000002 714941 40101800 STABILO LEGEND COLOURED ERASERS PK 20 5.17
Parameters
SBO
All, Abingdon College of Furthe
Supplier
All
Year
2010
Month
January
Apply

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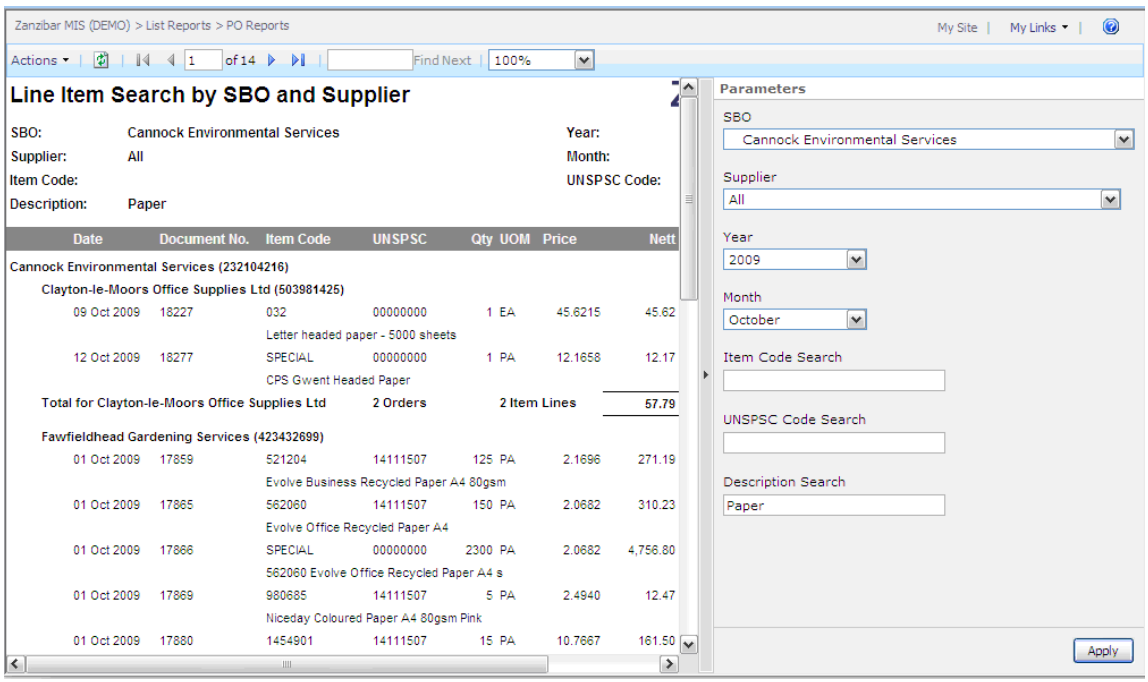
2.5.4.3.2 Line Item Search by SBO and Supplier (List)

A list of order items where the Item Code, Description or UNSPSC Code matches the search text entered. The data can be exported into the following formats:

- XML
- CSV (comma separated values)
- TIFF
- Acrobat (PDF)
- Excel

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s) from those available to them	Buyer Organisations available to that user
Supplier	Allows the user to select the required Supplier organisation(s) from those available to them	Supplier Organisations available to that user
Year	Allows the user to select a specific year	Years available on the system
Month	Allows the user to select a specific month	Calendar Months
Item Code Search	Free Text field to allow user to search the Line Items by Item Code	Free Text
UNSPSC Code Search	Free Text field to allow user to search the Line Items by UNSPSC Code	Free Text
Description Search	Free Text field to allow user to search the Line Items by Item Description	Free Text

Example:


Zanzibar MIS (DEMO) > List Reports > PO Reports
My Site | My Links | |
Actions | 1 of 14 | Find Next | 100%
Line Item Search by SBO and Supplier
SBO: Cannock Environmental Services
Year:
Supplier: All
Month:
Item Code:
UNSPSC Code:
Description: Paper
Date Document No. Item Code UNSPSC Qty UOM Price Nett
Cannock Environmental Services (232104216)
Clayton-le-Moors Office Supplies Ltd (503981425)
09 Oct 2009 18227 032 00000000 1 EA 45.6215 45.62
Letter headed paper - 5000 sheets
12 Oct 2009 18277 SPECIAL 00000000 1 PA 12.1658 12.17
CPS Gwent Headed Paper
Total for Clayton-le-Moors Office Supplies Ltd 2 Orders 2 Item Lines 57.79
Fawfieldhead Gardening Services (423432699)
01 Oct 2009 17859 521204 14111507 125 PA 2.1696 271.19
Evolve Business Recycled Paper A4 80gsm
01 Oct 2009 17865 562060 14111507 150 PA 2.0682 310.23
Evolve Office Recycled Paper A4
01 Oct 2009 17866 SPECIAL 00000000 2300 PA 2.0682 4,756.80
562060 Evolve Office Recycled Paper A4 s
01 Oct 2009 17869 980685 14111507 5 PA 2.4940 12.47
Niceday Coloured Paper A4 80gsm Pink
01 Oct 2009 17880 1454901 14111507 15 PA 10.7667 161.50
Parameters
SBO
Cannock Environmental Services
Supplier
All
Year
2009
Month
October
Item Code Search
UNSPSC Code Search
Description Search
Paper
Apply

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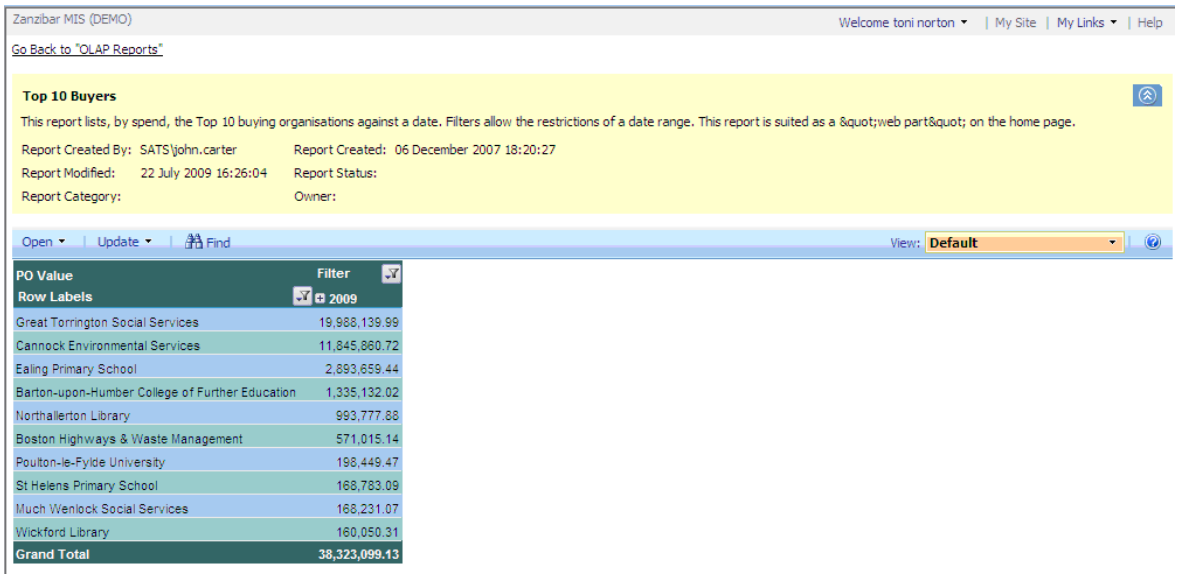
2.5.5 OLAP Reports

2.5.5.1 Top 10 Buyers

This report lists, by spend, the Top 10 buying organisations against a date. Available for export into Excel.

Parameter	Description	Values
Date	Allows the user to select required dates or date ranges	Specific dates, date ranges

Example:


Zanzibar MIS (DEMO)
Welcome toni norton | My Site | My Links | Help
Go Back to "OLAP Reports"
Top 10 Buyers
This report lists, by spend, the Top 10 buying organisations against a date. Filters allow the restrictions of a date range. This report is suited as a "web part" on the home page.
Report Created By: SATS\john.carter
Report Created: 06 December 2007 18:20:27
Report Modified: 22 July 2009 16:26:04
Report Status:
Report Category:
Owner:
Open | Update | Find
View: Default
PO Value
Filter
Row Labels
2009
Great Torrington Social Services 19,988,139.99
Cannock Environmental Services 11,845,860.72
Ealing Primary School 2,893,659.44
Barton-upon-Humber College of Further Education 1,335,132.02
Northallerton Library 993,777.88
Boston Highways & Waste Management 571,015.14
Poulton-le-Fylde University 198,449.47
St Helens Primary School 168,783.09
Much Wenlock Social Services 168,231.07
Wickford Library 160,050.31
Grand Total 38,323,099.13

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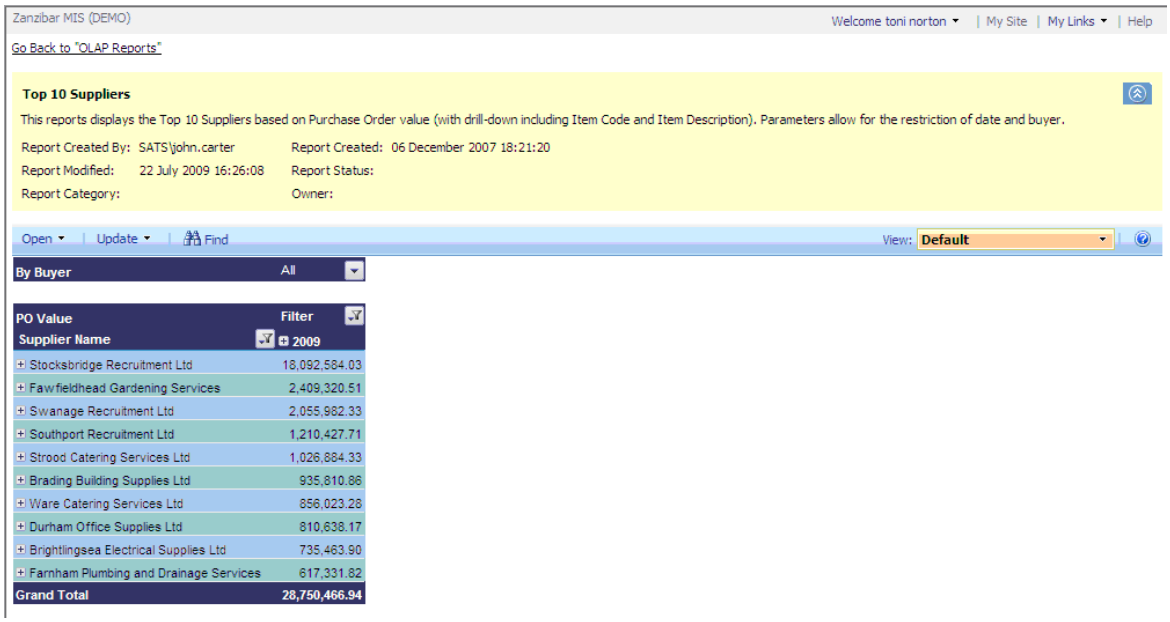
2.5.5.2 Top 10 Suppliers

This reports displays the Top 10 Suppliers based on Purchase Order value (with drill-down including Item Code and Item Description). Available for export into Excel.

Parameter	Description	Values
Subscribing Buying Organisation (SBO)	Allows the user to select the required Buyer organisation(s)	Buyer Organisations available to that user
Date	Allows the user to select required dates or date ranges	Specific dates, date ranges

Example:


Zanzibar MIS (DEMO)
Welcome toni norton | My Site | My Links | Help
Go Back to "OLAP Reports"
Top 10 Suppliers
This reports displays the Top 10 Suppliers based on Purchase Order value (with drill-down including Item Code and Item Description). Parameters allow for the restriction of date and buyer.
Report Created By: SATS\john.carter
Report Created: 06 December 2007 18:21:20
Report Modified: 22 July 2009 16:26:08
Report Status:
Report Category:
Owner:
Open | Update | Find
View: Default
By Buyer All
PO Value
Filter
Supplier Name
2009
Stocksbridge Recruitment Ltd 18,092,584.03
Fawfieldhead Gardening Services 2,409,320.51
Swanage Recruitment Ltd 2,055,982.33
Southport Recruitment Ltd 1,210,427.71
Strood Catering Services Ltd 1,026,884.33
Brading Building Supplies Ltd 935,810.86
Ware Catering Services Ltd 856,023.28
Durham Office Supplies Ltd 810,638.17
Brightlingsea Electrical Supplies Ltd 735,463.90
Farnham Plumbing and Drainage Services 617,331.82
Grand Total 28,750,466.94

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